



Xanadu Public Sector

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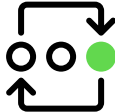
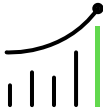
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Public Sector Digital Services (PSDS)

Extend beyond the packaged government case types, leveraging the government data model to create your own workflows with low-code tools. Fulfill public service requests end-to-end with pre-packaged playbooks. Deliver a personalized experience to take care of common constituent requests using resources like the portal, service catalog, virtual agent, and online communities. Use the ServiceNow® Public Sector Digital Services (PSDS) application to serve constituents, businesses, and agencies on a single platform.

Explore  Explore how Public Sector Digital Services can help you with its key features and benefits.	Configure  Customize your implementation of Public Sector Digital Services to meet your specific needs.	Integrate  Extend capabilities in Public Sector Digital Services by integrating with other applications.
Use  Learn how agents and constituents can use Public Sector Digital Services to create, route, and manage public service requests.	Analyze  Access preconfigured dashboards with actionable data visualizations to track key metrics and improve your service.	Reference  Get additional details on Public Sector components such as lists, tables, forms, rules, components, parameters, roles, and personas.
	Automate  Use Now Assist for PSDS to enhance user productivity and efficiency through proactive experiences using generative AI.	

Additional resources

- To learn more about what's new and changed, see the [Public Sector Digital Services release notes](#).
- Work with an implementation specialist to streamline your setup process. To learn more, see the [Customer Success Center](#).
- Sign up for the [ServiceNow Public Sector fundamentals training program and certification](#) to learn about core functionality and release-specific features.
- Visit [Now Community](#) to share knowledge and connect with others.
- Get step-by-step guidance to help with your ServiceNow® implementations, upgrades, and more, see [Now Create](#).

Exploring Public Sector Digital Services

Learn about Public Sector Digital Services features to help create a seamless support experience for constituents, businesses, internal agencies, and external agencies.

Public Sector Digital Services Overview

Public Sector Digital Services Overview

Benefits

Public Sector Digital Services enables government organizations and external agencies to support constituents and business stakeholders, all from a single platform. Extend beyond the packaged government case type, leveraging the government data model to create your own workflows with low-code tools. Fulfill public service requests end-to-end with pre-packaged playbooks. Deliver a personalized experience while increasing agent efficiency, driving action to take care of common constituent requests using resources like the portal, service catalog, virtual agent, and online communities.

Provide a platform for citizens to engage

Serve the public outside of government's walls and hours of operations. Give your constituents the choice of connecting through email, phone, chat, social media, or mobile- anytime, anywhere, and from any device. Provide a streamlined platform for the public to request government services through assisted and self-service. Omni-channel advanced work assignment automatically assigns public service cases to the best-equipped agent based on capacity, skills, and case context.

Assign tasks across the enterprise

Guide government workers to fulfill public service requests quickly and consistently, and monitor the progress of other agents and teams. Create a single flow of work across governments and agencies so that cycle times are minimized and automation is maximized, end-to-end. Enable service delivery from one agency to another by connecting the public sector to other departments such as field service, finance, and legal. Collaborate with other agencies using the visual task board, workflow, and automation.

Enable insights with reporting and dashboards

Identify opportunities to improve case resolution, agent performance, and the service experience, and act on trends revealed in Performance Analytics for Public Sector Digital Services. Monitor current and prior performance to identify areas for improvement of products, services, and processes. Unlock insights to anticipate trends, prioritize, and drive actionable improvements, such as automating the most frequently recurring case resolutions.

Manage case volume with self-service

Encourage constituents to help themselves with a self-service catalog, communities, knowledge base, and portal. Expand customer support for constituents and businesses by implementing Virtual Agent, a chatbot that runs on the Government Service Portal and in supported third-party messaging applications, such as Engagement Messenger. Public sector end users can request non-emergency services through a prebuilt, automated conversation that helps them submit a request.

Key features

Public Sector Digital Services offers key features that enable administrators and agents to provide the services and support requested by constituents and businesses.

Public sector key features

Feature	Description	Role
Social Benefits Playbook	End-to-end playbook experience that walks government service agents through the process of creating or servicing applications for one or more social benefit programs	Agent
License and Permit Playbook	End-to-end playbook experience that walks government service agents through the process of creating or servicing license and permit applications	Agent
Information Request Playbook	End-to-end playbook experience that walks government service agents through the process of creating or servicing requests for public records and information	Agent
Service Request Playbook	End-to-end playbook experience that walks government service agents through the process of creating or servicing non-emergency service requests	Agent
Government Service Portal	A dedicated portal for constituents, business stakeholders, and contributors (working on behalf of constituents), to request public services, track cases, view and update their profiles, report issues, request government documents, and more. Business owners	Constituent

Public sector key features (continued)

Feature	Description	Role
	can also register a business, manage contacts, and request public services, permits, or licenses.	
Agency Services Portal	A dedicated portal for agencies to manage internal and external agency locations, and add service catalog items to specific agency locations.	Agent
Now Assist for PSDS	Use Now Assist for PSDS to summarize case information and generate case resolution notes. Enable your agents to understand case context so that they can propose resolutions to your constituents.	Agent
Public Services Performance Analytics	Performance indicators and data visualizations on government services offered to and requested by constituents, businesses, and agencies.	Manager
CSM Configurable Workspace Public Sector Digital Services	A dedicated, customizable workspace for government agents and agents from external agencies to work on issues and deliver services for constituents, agencies, and businesses. Agents can manage their cases, check on service requests, and even initiate requests for others.	Agent
Persona-based Roles in Public Sector Digital Services	Roles for public sector job functions. These roles control access to public sector features and information. For details, see Persona-based Roles in Public Sector Digital Services .	Administrator
Service definitions for Public Sector Digital Services	Enables you to map a public service, information service, or license and permit service to the list of services your agency offers for resolving that request.	Administrator
Virtual Agent	Aids users in completing or updating requests for various public services with Virtual	Agent

Public sector key features (continued)

Feature	Description	Role
	Agent, a chatbot that runs on the Government Service Portal and in supported third-party messaging applications, such as Engagement Messenger.	
Extendable Data Model	The flexibility of the Public Sector Digital Services platform provides you with a data model that you can extend and leverage to fit your needs.	Administrator
Extendable Service Catalog	Types of services available, such as licenses, permits, service requests, and benefits. Prebuilt service request options that constituents and businesses can choose from the Government Service Portal.	Administrator
Extendable Government Service Case	The base case type tailored for government services. You can extend this case type to create other government case types for various government services.	Administrator

Playbooks for Public Sector Digital Services

A playbook provides government service agents with step-by-step guidance through the life cycle of a public service request case. Use Playbooks to fulfill requests for licenses and permits, government records and other public information, or non-emergency service requests.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.

By using a playbook, you can visualize the entire life cycle of the public service case workflow. With a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The following applications are available with Public Sector Digital Services that enable you to create and use playbooks:

Social Benefits Playbook

Provides an end-to-end workflow for handling applications for social benefit programs submitted by public sector end users.

License and Permit Playbook

Provides an end-to-end workflow for handling license and permit requests submitted by public sector end users.

Information Request Playbook

Provides an end-to-end workflow for handling public record and information requests submitted by public sector end users.

Service Request Playbook

Provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users.

The corresponding playbook for each case type automatically appears in the **Playbook** tab when an agent creates a public service request case in the CSM Configurable Workspace, or when a constituent puts in a request through the Government Service Portal.

To learn more about playbooks, see [Using Playbooks for Public Sector Digital Services](#).

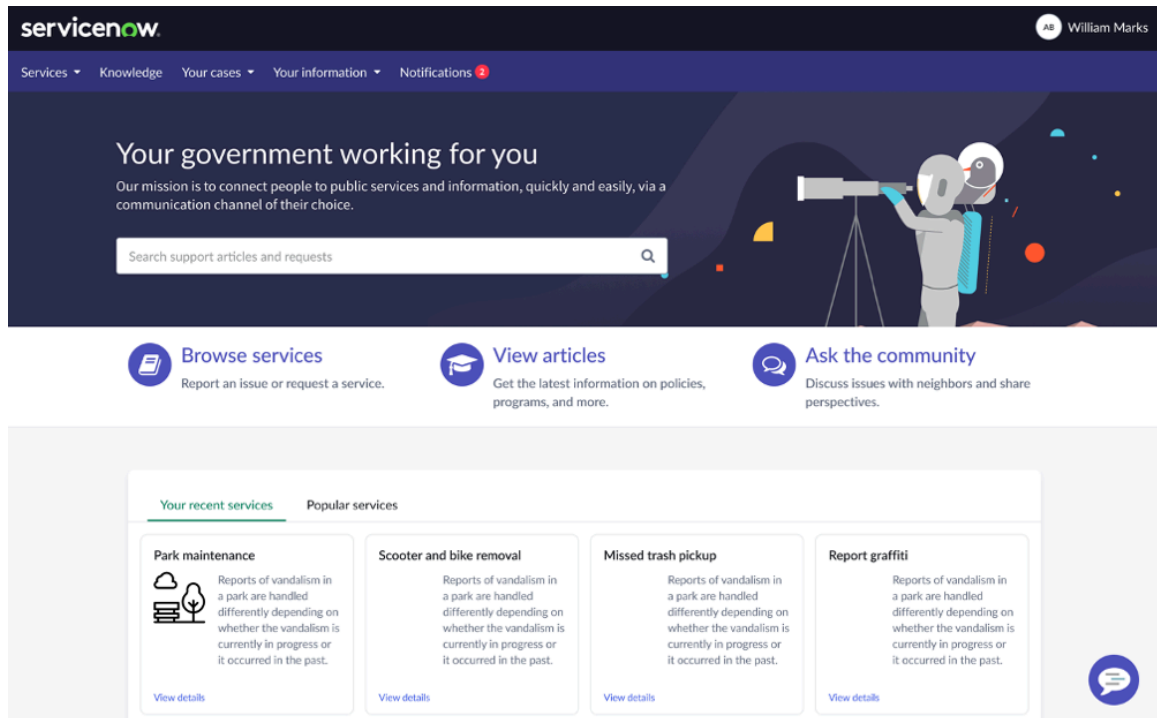
Government Service Portal

By using the Government Service Portal, constituents and businesses can report issues, access and view the status of existing service requests, request public records, search for information about a question or issue, view and update their contact information, and request assistance from a government service agent— all in a user-friendly, customizable interface.

Government Service Portal for constituents

The Government Service Portal experience begins on the portal home page for constituents. Agencies usually customize their home pages to be viewed by logged-in users and users who aren't logged in. For example, a logged-in user might see different information on the home page than a user who isn't logged in.

This example shows the default home page for a registered user of the Public Sector Digital Services Government Service Portal.



Note:

Administrators can customize Government Service Portal home pages in Service Portal, so home page appearance might differ across government agencies.

Constituents can do the following tasks in the Government Service Portal:

- Register as a new user, create a login, and create a user profile.
- Browse and request services or information, track cases, view received services, and report issues.
- Search for information, browse knowledge articles, and engage with the community.
- Get the latest information on policies and programs by searching and viewing articles.
- Discuss issues with neighbors and share perspectives by asking the community.
- View your recent services and see the popular services on the site.
- Get help using Virtual Agent.
- Request services such as street repair, trash removal, building inspections, and other public maintenance.
- Request information and public records from local, state, and federal public agencies.

For more information on the services that are offered in the Government Service portal service catalog, see [Government Service Portal service catalog list](#).

Government Service Portal for businesses and business entities

The Government Service Portal enables businesses to access their cases and service information as well as report issues. Business or business contacts can use the Government Service Portal to view their submitted cases, and raise requests by using the service request catalog.

Business contacts have the same functionality as a constituent user, with a few additional permissions. In addition to the constituent user tasks, business contacts can do the following tasks in the Government Service Portal:

- Register a new business.
- Request services that are related to licenses, social benefit programs, permits, information, and service requests.
- Request services that are related to grants, social benefit programs, licenses, permits, information, and public services.
- View the services that they received.
- View information records that they requested.
- View all license or permit requests.
- View items that they received.
- View their existing cases.
- View business and child business profiles.
- View business contact information such as names, addresses, and other contact information.
- View publications, such as government pamphlets and newsletters about services.
- View notifications such as government notifications and new contact approvals.

Agent experience

Public Sector Digital Services provides agents across government agencies with a tailored workspace experience to work on cases created by constituents, businesses, and agencies.

CSM Configurable Workspace

Your government service agents have one stop for constituent interactions, the CSM Configurable Workspace for Public Sector Digital Services.

Multiple tabs enable agents to manage several cases at once. Agents and managers have ongoing visibility into the status of issues assigned to different agents across the agency. The workspace dynamically displays related contextual information based on the current state. Agents can also set compact mode and dark mode to optimize their experience and productivity. Public Sector Digital Services playbooks are accessed through the CSM Configurable Workspace.

To learn more about CSM Configurable Workspace, see [Explore CSM Configurable Workspace](#) .

Mobile Agent

Your government agents can use the Mobile Agent to create, update, and monitor non-emergency requests on a mobile device. You can also get an overview of your case load, including your new and active service request cases.

The Mobile Agent is only supported by the Service Request Playbook.

To learn more about the Mobile Agent application, see [Mobile Agent experience for Public Sector Digital Services](#).

Advanced Work Assignment

Use the Advanced Work Assignment (AWA) application to auto-route and auto-assign public sector work items, such as non-emergency requests, to the best-equipped agents, based on their availability, capacity, and skills.

To learn more about Advanced Work Assignment, see [Automatically route service requests using Advanced Work Assignment](#).

Configuring Public Sector Digital Services

Set up Public Sector Digital Services to enable government agents and service managers to provide government services to constituents, businesses, and other agencies.

Installing and Setting up Public Sector Digital Services

Configuring Public Sector Digital Services involves several main tasks:

- Installing and setting up the Public Sector Digital Services Core application and the Performance Analytics content pack.
- Setting up one or more playbooks in the CSM Configurable Workspace for use with Public Sector Digital Services.
- Configuring additional features for public sector use, such as Virtual Agent, Engagement Messenger, and custom service definitions.

As a user with the admin role, complete the following main configuration tasks to set up Public Sector Digital Services.

Public Sector Digital Services configuration tasks

Configuration task	Description
Install and configure the Public Sector Digital Services Core application	Install and configure the Public Sector Digital Services Core application (sn_gsm) plugin from the ServiceNow Store. It provides the public sector features used by constituents, businesses, agency agents, government agents, and government service managers.
Install the Performance Analytics Content Pack for Public Sector Digital Services	Install the Performance Analytics Content Pack for Public Sector Digital Services (com.sn_public_sector_digital_services_pa) plugin from the ServiceNow Store. This application provides dashboards that government agents and service managers can use to track government cases and monitor government services offered to and received by constituents.
Install and configure Now Assist for Public Sector Digital Services (PSDS)	Install and configure the Now Assist for Public Sector Digital Services (PSDS) application so that your agents can use the generative AI skills in CSM Configurable Workspace and in Core UI.
Install and configure the Service Request Playbook application	Install and configure the Service Request Playbook application (sn_gsm_srvc_req) plugin from the ServiceNow Store. It provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users.

Public Sector Digital Services configuration tasks (continued)

Configuration task	Description
Install and configure the Information Request Playbook application	Install and configure the Information Request Playbook application (sn_gsm_info_req) plugin from the ServiceNow Store. It provides an end-to-end workflow for handling public record information requests submitted by public sector end users.
Install and configure the License and Permit Playbook application	Install and configure the License and Permit Playbook application (sn_gsm_license_permit) plugin from the ServiceNow Store. It provides government agents with a pre-defined process for handling and resolving license and permit requests submitted by public sector end users.
Install and configure the Social Benefits Playbook application	Install and configure the License and Permit Playbook application (sn_gsm_license_permit) plugin from the ServiceNow Store. It provides government agents with a pre-defined workflow for reviewing applications for the social benefit programs offered by your agency.

Other configuration tasks

In addition to installing the public sector application and playbooks, you can configure other features for public sector use:

ServiceNow® Virtual Agent

Virtual Agent, which is included with a public sector subscription, provides end-user assistance through automated conversations in chat channels.

The Public Sector Digital Services Core application offers several prebuilt public sector components (topic blocks) that conversation designers can use to create Virtual Agent conversations.

The Service Request Playbook application provides a prebuilt Virtual Agent conversation topic, Create a service request, to help constituents submit non-emergency service requests.

For details on configuring Virtual Agent for public sector use, see [Configure Virtual Agent for Public Sector Digital Services](#).

Service definitions

A service definition enables you to map a public service, information service, or license and permit request service to the list of services your agency offers for resolving that request.

As an admin, you can create service definitions that connect the services your agency offers to the services being requested by a constituent or business. When you create a service definition, you can configure the case management processes, such as the case types, for executing those services.

For more information, see [Service definitions for Public Sector Digital Services](#).

Relabel menu items in CSM Configurable Workspace after upgrade

After you upgrade your instance to a new release, certain menus and menu items in the CSM Configurable Workspace might not be labeled appropriately for public sector use. You can relabel the following items for public sector use by changing them in the UX list categories for Customer and Service Organizations.

For details, see [Relabel items for public sector use after upgrade](#).

Install and configure the Public Sector Digital Services Core application

Install the Public Sector Digital Services Core application and configure various features used in the application.

As admins, perform the following administration tasks to install the Public Sector Digital Services Core application and configure key features. After the Public Sector Digital Services Core application is installed, admins configure public service offerings that define services available for request and the agencies that provide them.

Install tasks for Public Sector Digital Services Core

Task	
Install Public Sector Digital Services Core	Install Public Sector Digital Services Core (sn_gsm) from the ServiceNow® Store. It provides these key features: • Government Service Portal: Used by constituents and businesses to find, track, and request government services. • Agency Services Portal: Used by admins and managers to manage internal and external agency locations. • CSM Configurable Workspace: Used by agency agents, government agents, and government service managers to interact with and assist constituents, businesses, and contributors who are authorized to represent or assist constituents and businesses. This workspace requires configuration for public sector use.
Review and assign roles to public sector users	Assign public sector roles to users or groups that have been configured in the ServiceNow AI Platform®. For additional role information, see Roles installed with Public Sector Digital Services Core.
Configure Public Sector Digital Services Core using guided setup	Use guided setup to customize the Government Service Portal used by constituents, businesses, and agencies; configure the CSM Configurable Workspace for agents; and set up other features for public sector use.

Install tasks for Public Sector Digital Services Core (continued)

Task	
Optionally configure Public Sector Digital Services Core without guided setup	Customize the government service portal and configure the CSM Configurable Workspace for agents.
Configure Virtual Agent for Public Sector Digital Services	Set up Virtual Agent so that conversation designers (topic authors) can create and modify chatbot conversations for public sector use cases. Also enable your end users to run Virtual Agent in the Government Service Portal and get help with self-service tasks.
Configure a service for constituent, business, or agency	Define the type of public service offered, the service taxonomy, and agency that offers the service.

Install Public Sector Digital Services Core

You can install the Public Sector Digital Services Core application (sn_gsm) if you have an admin role. The application includes demo data.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#) .
- Review the Public Sector Digital Services Core application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

The Public Sector Digital Services Core application requires a subscription.

Role required: admin

About this task

For more information, see [Components installed with Public Sector Digital Services Core](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Public Sector Digital Services Core application (sn_gsm) by using the filter criteria and search bar.

You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.

Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install.**

What to do next

Use [guided setup](#) to configure the Public Sector Digital Services Core application. If you're not using guided setup, you can customize the Government Service Portal and configure the CSM Configurable Workspace for public sector use by following the [optional configuration steps for Public Sector Digital Services Core](#).

Configure Public Sector Digital Services Core using guided setup

Walk through the guided setup processes to configure the Public Sector Digital Services Core application.

Before you begin

[Install the Public Sector Digital Services Core application.](#)

Role required: admin

About this task

The Public Sector Digital Services Core application is built on the Customer Service Management application. As part of the guided setup for the Public Sector Digital Services Core application, you also use guided setup for Customer Service Management to configure foundation data and workflows.

Procedure

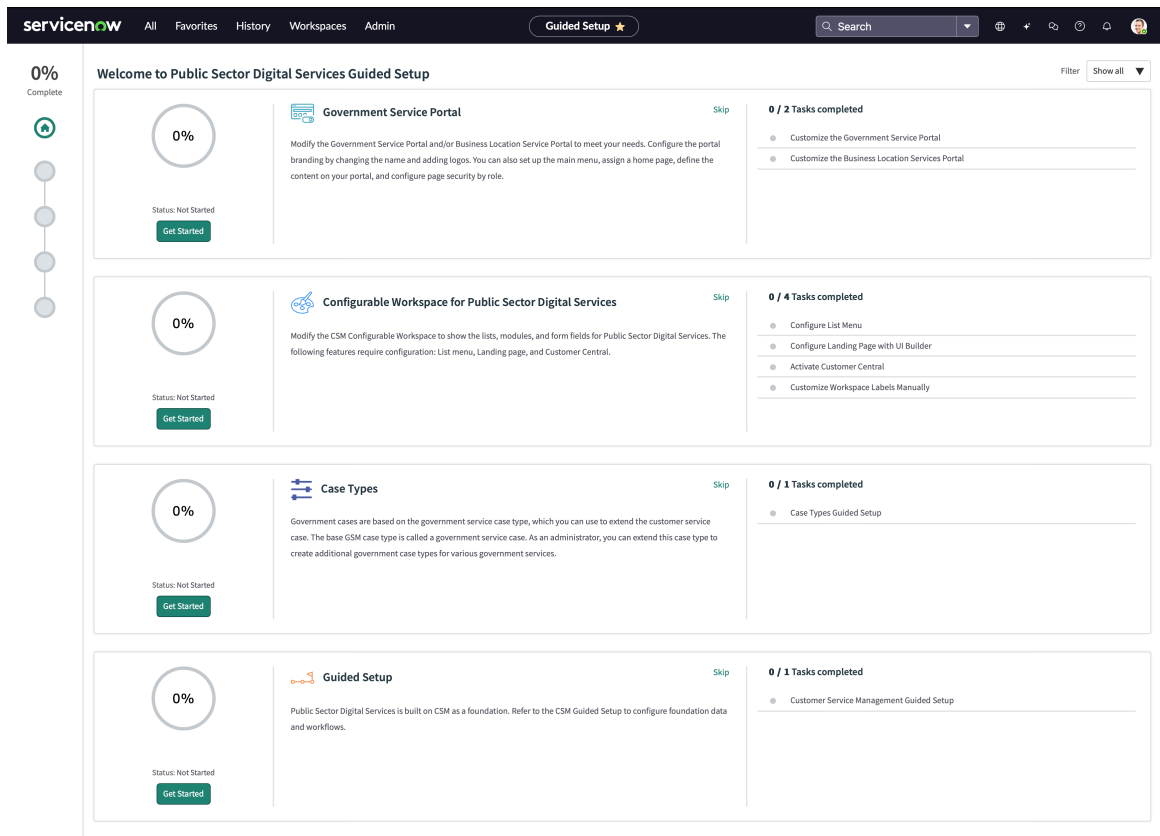
1. Navigate to **All > Constituent Service > Administration > Guided Setup.**

The Welcome to Public Sector Digital Services Guided Setup page displays.

2. Review the Getting Started and Public Sector Digital Services Pre-setup Checklist sections, which give information on the setup process and the various requirements to consider before implementing Public Sector.

3. Select **Get Started to begin configuration.**

The setup page displays the different categories of configuration tasks to be completed.



4. For each category, select **Get Started** and complete the tasks.

What to do next

After you've completed the setup tasks, you can install other public sector applications, such as the [Service Request Playbook application](#) and the [Performance Analytics Content Pack for Public Sector Digital Services](#).

Configure User Roles in Public Sector Digital Services

The Public Sector Digital Services application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users and public sector entities. These roles provide different levels of access to public sector data, to help maintain data security.

Public Sector Digital Services provides many functional and granular roles that you can assign to public sector users.

You can assign roles to users or groups that have been configured in the ServiceNow AI Platform[®]. A user is an individual who can access your instance and a group is a set of users who share a common purpose. The users associated with a group are listed as group members. After your users and groups are configured, you can assign roles to them.

For more information about roles, see [Roles installed with Public Sector Digital Services Core](#).

You can assign roles to users and groups using guided setup, or you can use the following ServiceNow AI Platform user administration features to create users and groups and assign the appropriate public sector roles:

Configuring users, groups, and roles

To	See
Create users and groups	• Create a user. • Create a user group. • Add a user to a group.
Assign roles to users and groups	• Assign a role to a user. • Assign a role to a group.

Optional configuration steps for Public Sector Digital Services Core

As an admin, you can customize the Government Service Portal and configure the CSM Configurable Workspace for the Public Sector Digital Services Core application without using guided setup.

For example, the Government Service Portal is tailored for public sector use, but you can customize the portal by adding your own branding such as an agency name and logo. You can also configure various elements of the workspace to display the appropriate public sector modules, lists, and fields, and activate other workspace features for your agents, such as Customer Central.

Customize the Government Service Portal

Modify the Government Service Portal to meet your needs, for example to set the portal branding.

Before you begin

You can customize the government service portal by following this procedure or by using [guided setup for Public Sector Digital Services Core application](#).

Role required: admin

Procedure

Navigate to **All > Service Portal > Service Portal Configuration**.

Some of the components that you can customize include:

- **Branding:** [Configure the portal branding](#) to give your Government Service Portal its own look and feel. For example, you can give your portal a name and add your logo.
- **Menus:** [Configure the portal header menu](#) to set up the main menu, one of the main navigation controls for your users.
- **Homepage:** [Assign a homepage to the portal](#).
- **Widgets:** Use [Service Portal widgets](#) to define the content in your portal.
- **Roles:** [Configure page security by role](#) to either set up pages to be public (no login required) or to filter them by user role.

Set up the CSM Configurable Workspace for Public Sector Digital Services

Modify the CSM Configurable Workspace to show the lists, modules, and form fields for Public Sector Digital Services.

Certain features in the CSM Configurable Workspace for Public Sector Digital Services require configuration for public sector:

- List Menu
- Public Sector landing page
- Customer Central

Certain features, such as auto-reflow , which restructures Configurable Workspace pages vertically when the user zooms in, are available on the page-level automatically. However, administrators can disable auto-reflow for selected experiences, pages, or for the entire Configurable Workspace. For information on how to disable this feature, see [Reflow for Configurable Workspace](#) .

Note:

You can use guided setup to configure these configurable workspace features. For details, see [Configure Public Sector Digital Services Core using guided setup](#).

Configure the List Menu for Public Sector Digital Services

Add public sector-related menu options to the List Menu in the CSM Configurable Workspace.

Before you begin

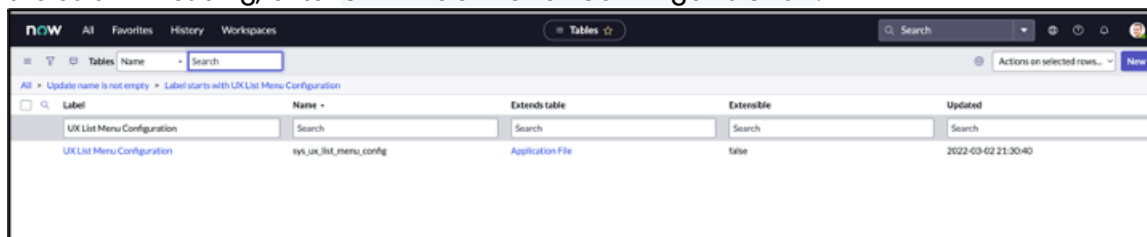
Role required: admin

About this task

To configure the List Menu, you can follow this procedure or use [guided setup](#) for the Public Sector Digital Services Core application.

Procedure

1. Navigate to **All > System Definition > Tables**.
2. In the Tables [sys_db_object] table, select the **Search** icon next to the **Label** column and under the column heading, enter **UX List Menu Configuration**.



The screenshot shows the ServiceNow 'Tables' page. The 'Label' column is selected, and the search filter 'UX List Menu Configuration' is applied. The table lists the configuration details for this table.

Label	Name	Extends table	Extensible	Updated
UX List Menu Configuration	Search	Search	Search	Search
UX List Menu Configuration	sys_list_menu_config	Application File	false	2022-03-02 21:30:40

3. In the UX List Menu Configuration List table, go to **Related Links** and select **Show List**.

Package	Reference	Application	Sys ID	Active
Protection policy	String	(empty)	40	false
Application	Reference	Application	32	false
Updated by	String	(empty)	40	false
Updated	Date/Time	(empty)	40	false
Update name	String	(empty)	250	false
Active	True/False	(empty)	40	true
Description	String	(empty)	4,000	false
Name	String	(empty)	255	true
Sys ID	Sys ID (GUID)	(empty)	32	false

4. **Optional:** From the Context menu, select **Create Favorite** to bookmark the UX List Menu Configurations table so that you can quickly access it if you need to make changes later.

Name	Search	Active	Description
CMDB Workspace	Search	true	List configuration for asset operations
CSM/FSM Configurable Workspace List Menu...	Search	true	Default list for CMDB app
Default	Search	true	List menu for the base CWF Agent Workspace

(Optional)

5. Remove the categories that are not applicable to Public Sector Digital Services.

a. Select the **CSM/FSM Configurable Workspace List Menu** record and go to the **UX List Categories** tab.

Title	Description	Active	Order	Updated
Customer Cases		true	0	2021-11-22 15:46:05
Financial Services Tasks		true	0	2021-07-28 00:21:01
Financial Services Cases		true	0	2021-07-28 00:21:59
Document verification task		true	1	2022-03-11 03:04:47
Complaint service cases		true	1	2021-06-16 17:16:26
Complaint service tasks		true	2	2021-06-16 17:16:32
Quality control tasks		true	3	2021-06-16 17:16:38
Document Services		true	5	2021-08-04 20:57:24

- b. For each of the following categories, select the category record and change the Active value to false:

Note:

If the following message is displayed, select **here** to edit the page.

 This record is in the **CSM Configurable Workspace** application, but **Global** is the current application. To edit this record click [here](#).

- Cases
- Major Issue Management
- Tasks
- SLAs
- Incidents
- Problems
- Change
- Requests
- Catalog Tasks
- CMDB
- Conversation Monitoring

What to do next

Configure the Public Sector landing page using UI Builder.

Configure the Public Sector landing page with UI Builder

Use the UI Builder to change certain fields in the Public Sector landing page of the CSM Configurable Workspace.

Before you begin

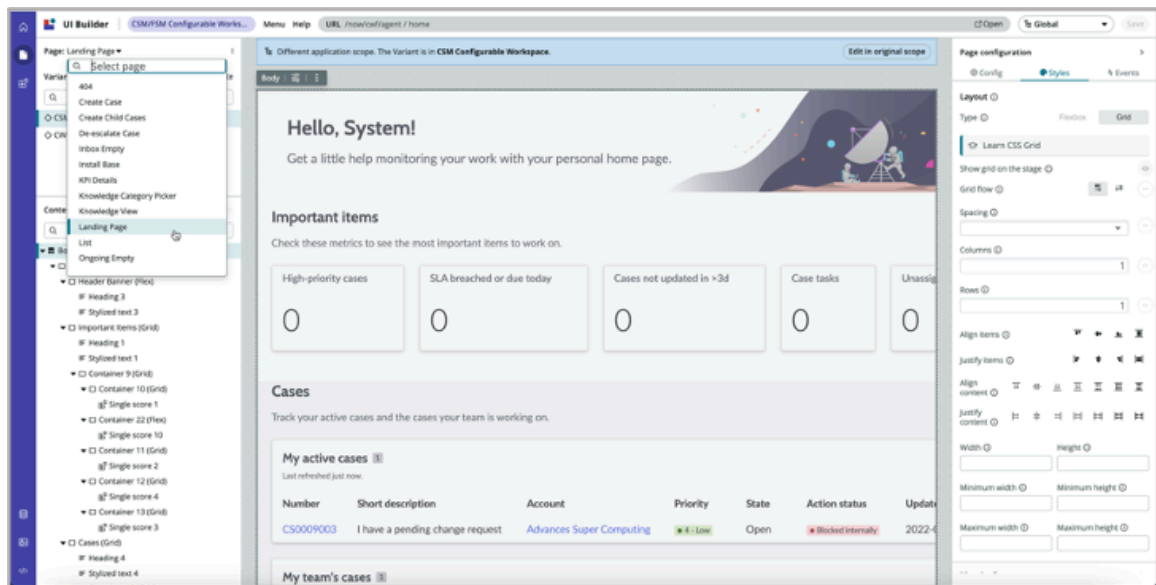
Role required: admin

About this task

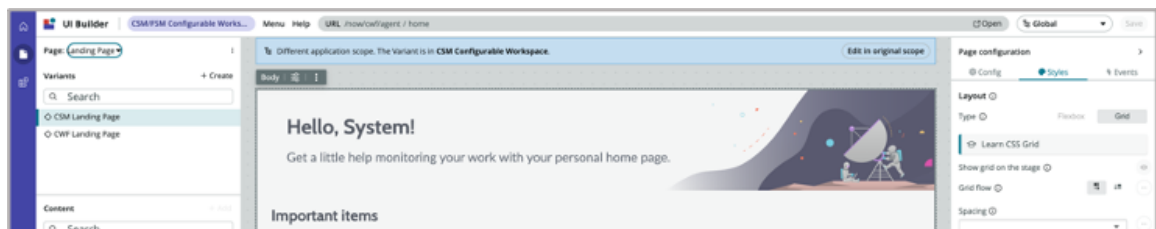
The CSM Landing Page gives agents an overview of their new, assigned, and high-priority cases, plus the cases assigned to their groups. Replace certain fields in the landing page with fields relevant to public sector. You can also add or change other fields as needed. For more information on using UI Builder to modify pages, see [Work with pages](#) .

Procedure

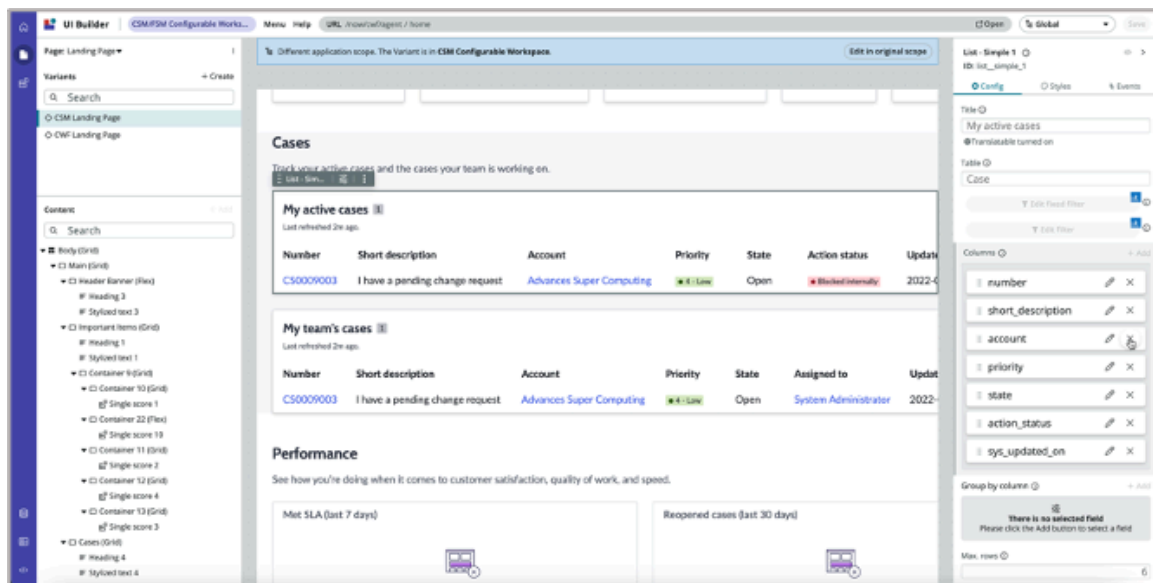
1. Navigate to **All** and in the filter, enter and select **UI Builder**.
2. Navigate to the CSM Landing Page:
 - a. In the list of **My experiences**, select the **CSM/FSM Configurable Workspace**.
 - b. In **UI Builder**, navigate to **Page > Landing Page** and select **CSM Landing Page**.



c. In the message displayed at the top of the page, select **Edit in original scope**.

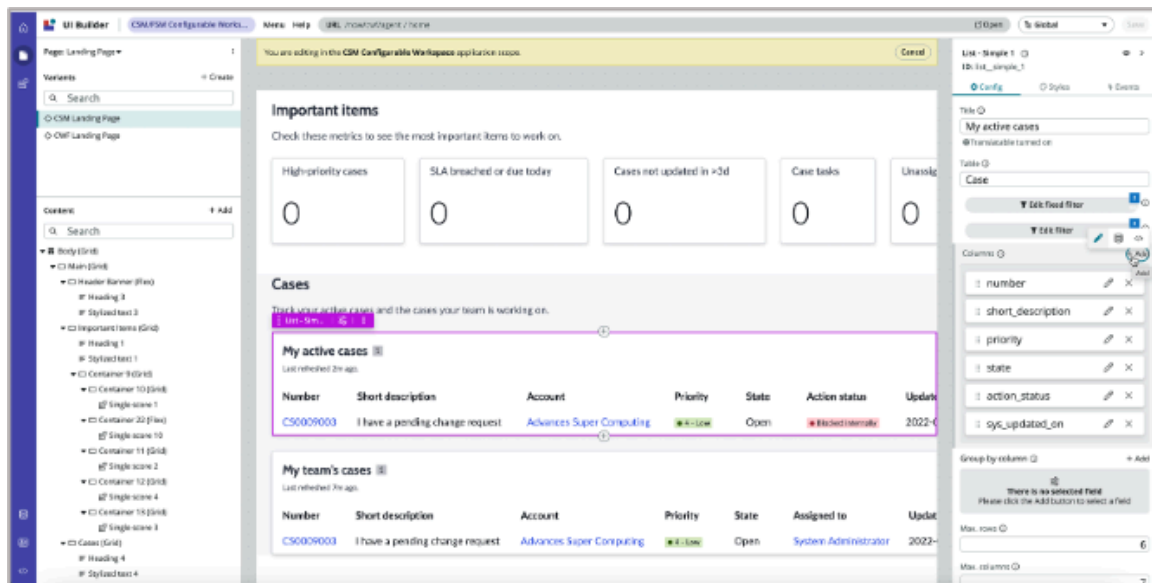


3. In the CSM Landing Page, select the **My active cases** component and in the **Config** tab of the Configuration pane, delete the **account** field from the **Columns**.

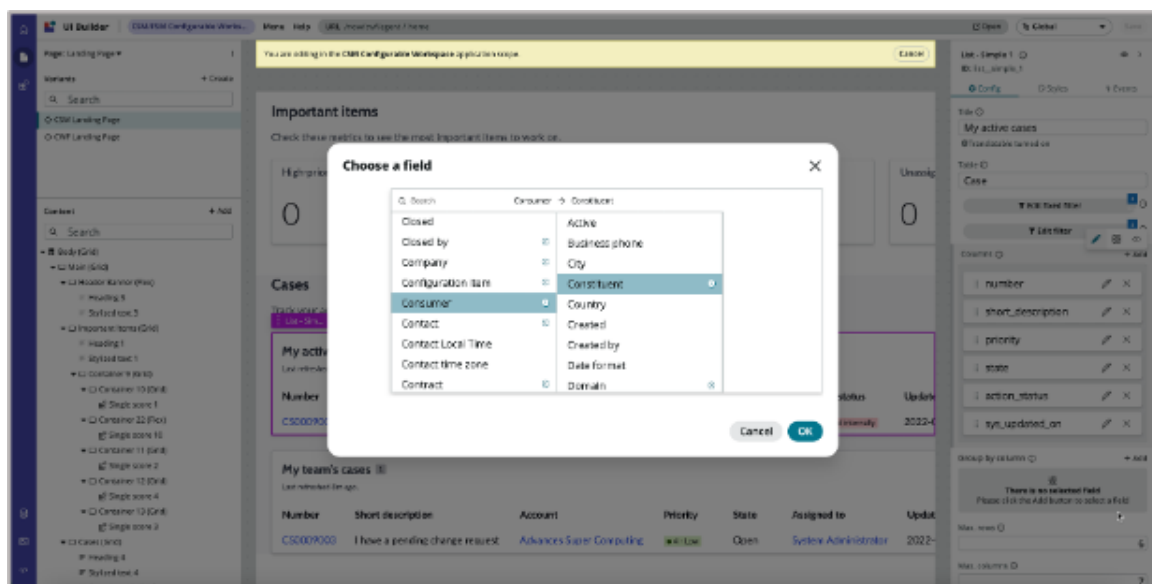


4. Add the **Constituent** field:

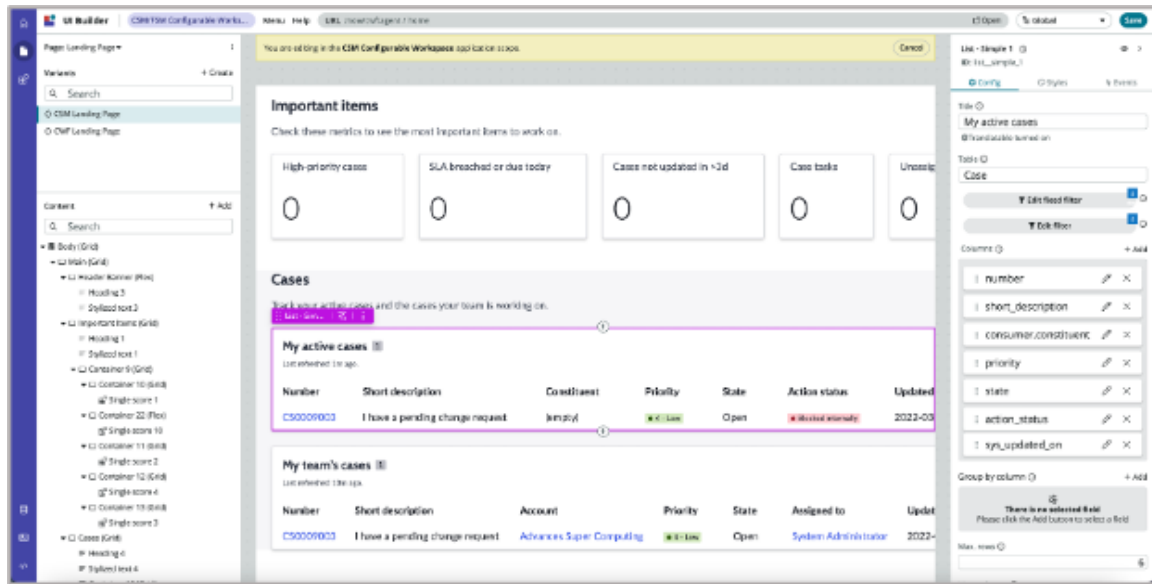
a. In the Configuration pane, select **+Add** in the **Columns** list to open the field chooser.



b. In the Choose a field list, select **Consumer > Constituent** and then select **OK**.



- c. In the Configuration pane, rearrange the columns by moving **consumer.constituent** below **short.description**.



5. Repeat Steps 3 and 4 to change the **My Team's cases** component.
6. Make other page changes as needed.
7. Select **Save** in the top right corner to save the landing page changes.

Activate Customer Central for viewing profile information

Install Customer Central using Customer Service Guided Setup so that agents can have a complete view of constituent, business, or agency information in Public Sector Digital Services.

Before you begin

Role required: admin

About this task

Customer Central displays all the touchpoints that a constituent, business, or agency has with a government center or agency, in the form of information cards.

Procedure

1. Navigate to **All > Customer Service > Administration > Guided Setup**.
2. In the section **Customer Central - Customer Information for CSM Configurable Workspace**, locate the list of tasks for setting up the configurable workspace.
3. Select **Activate Customer Central** to install the plugin.

After installation, one of the following tabs is available on the interaction record:

- The **Constituent Information** tab when the **Constituent** tab is populated.
- The **Business Information** tab when the **Business** tab is populated.
- The **Agency Information** tab when the **Agency** tab is populated.

You can perform other changes to this layout, as needed. For more information, see [Configure the Customer Information view using the CSM Configurable Workspace](#).

Set a default view for Items Received in the Public Sector Digital Services platform

Customize the default view in the Public Sector Digital Services platform workspace so that the Items Received related list is displayed under a business, constituent, or agency record.

Before you begin

Role required: none

Procedure

1. Navigate to a business, constituent, or agency record in the Public Sector Digital Services platform.
2. Select the list controls icon (), and point to **View**.
3. Select **PSDS** from the dropdown.

Result

The user view is changed, and the Items Received related list is viewable.

Configure related parties for items received

Add related parties to an item received in the Public Sector Digital Services application so that the contacts, businesses, constituents, or agencies can get the correct access level to perform the actions that they need for a case.

Before you begin

Role required: admin, sn_gsm.constituent, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

Procedure

1. Navigate to the CSM Configurable Workspace and select the Lists icon  in the sidebar.
2. Navigate to **Item Received > All**.
3. Select the record that you want to add the related parties to.
4. From the Related Parties related list, select **New**.
5. On the form, fill in the fields.

Related Parties Record form

Field	Description
Type	Related party type. The related party type can be a contact, consumer, or a contributor user. You can select from the list of related party configurations for the cases that are provided with the base system: ○ Authorized Business ○ Authorized Contact ○ Authorized Constituent ○ Authorized Household ○ Authorized Agency ○ Authorized User ○ Listed Constituent ○ Listed Agency

Field	Description
Case	Auto-generated case number.
Business, constituent, household, or user	Contact responsible for the case.
Responsibility	Access level to the case information. When you select the related party type, the associated responsibility gets added by default. If the related party type is changed, the responsibility that corresponds with the related party type gets updated accordingly. Note: If the related party type is selected but the responsibility field isn't automatically filled in, your contacts don't have access to the sold product (service received) and associated case.

6. Select **Submit**.

The related parties are added to the case.

Result

After a related party is added to the case as an authorized representative with a functional role, the related party can perform the following actions:

- Close a case.
- Create a case for service received (sold product).
- Receive notifications on case updates.
- Update the customer-visible case tasks.
- Add additional comments and attachments.
- Accept or reject a solution.

Configure Virtual Agent for Public Sector Digital Services

Set up ServiceNow® Virtual Agent so that conversation designers (topic authors) can create and modify automated conversations for public sector use cases. Also enable your end users to run Virtual Agent in the Government Service Portal and get help with self-service tasks.

Before building Virtual Agent topics for public sector use cases

As admins or topic authors (users with the virtual_agent_admin role), you can do the following with Virtual Agent:

- Use pre-built conversations and topic blocks (components that run subflows or common functions in a conversation). Pre-built conversations and topic blocks are available with the Virtual Agent platform, Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent), and Service Request Playbook application. Pre-built Public Sector topic blocks are available with the Public Sector Digital Services Core application.
- Build your own custom, public sector conversation topics. You can duplicate pre-built topics and topic blocks and then customize them as needed.

Before you or your topic authors (users with the virtual_agent_admin role) create or modify Virtual Agent conversations, meet the following prerequisites for working with pre-built topics and topic blocks in Virtual Agent Designer:

- [Activate the Glide Virtual Agent plugin](#)  (com.glide.cs.chatbot) to access platform topics and topic blocks and run Virtual Agent Designer.
- [Activate the Customer Service Virtual Agent plugin](#)  (com.sn_csm.virtualagent) to access pre-built Customer Service Management conversations and topic blocks.
- [Become familiar with Virtual Agent Designer](#)  to create and update conversation topics.
- [Install Public Sector Digital Services Core](#) application to access public sector topic blocks that can be used in public sector conversations.
- [Install Service Request Playbook for Public Sector Digital Services](#) to access the pre-built topic, **Create a Service Request**.
- [Install License and Permit Playbook for Public Sector Digital Services](#) to access the pre-built topic, **Start a License/Permit Application**.

Configure Virtual Agent conversations for public sector users

As admins or topic authors (users with the virtual_agent_admin role), you can deploy pre-built conversation topics to your end users, such as the **Create a Service Request** topic provided with the Service Request Playbook application, as well as custom conversation topics that you create.

These blocks are subflows that run conversational elements or common tasks in a conversation, such as adding or retrieving records. Topic blocks enable topic authors to quickly add standard functions to Virtual Agent conversations, simplifying conversation design and maintenance.

1. Configure Agent Chat in the Government Service Portal.
 - a. Navigate to **All >Service Portal >Agent Chat**.
 - b. Locate **GSP Chat**, and select the checkbox to set the record to **Active**.
2. In Virtual Agent Designer, search for the corresponding topic block.
 - For Service Request Playbook requests, search for and select **Create a Service Request**.
 - For License and Permit Playbook requests, search for and select **Start a License/Permit Application**.
3. Select **Publish** to set the topic block to Active and make it available to your end users. For more information on creating and publishing Virtual Agent topics, see [Publish a Virtual Agent topic](#) .

For more information on working with topics in Virtual Agent Designer, see [Getting Started with Virtual Agent Designer](#) .

Example Virtual Agent topics

The Public Sector Digital Services Core application provides several OOB topic blocks that you can use in public sector conversations:

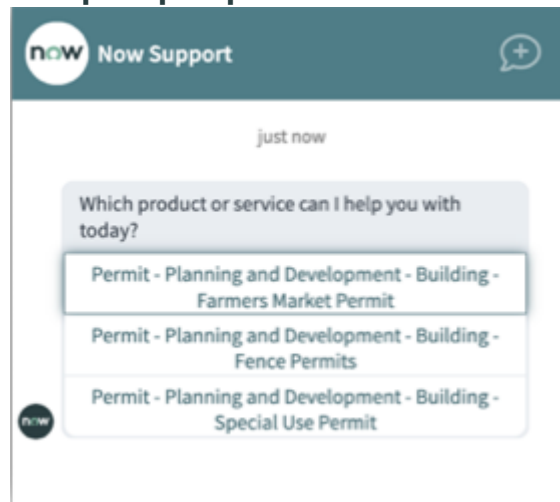
- Prompt Service for Constituent – Asks constituents to select a type of government service.
- Create Public Sector Additional Members – Prompts constituents to add other persons who have an authorized interest in an issue or case.

Prompt Service for Constituent topic block

Use this topic block in a conversation to ask constituents to select a service from a list of available government services, for example permits or licenses. Activate the

Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

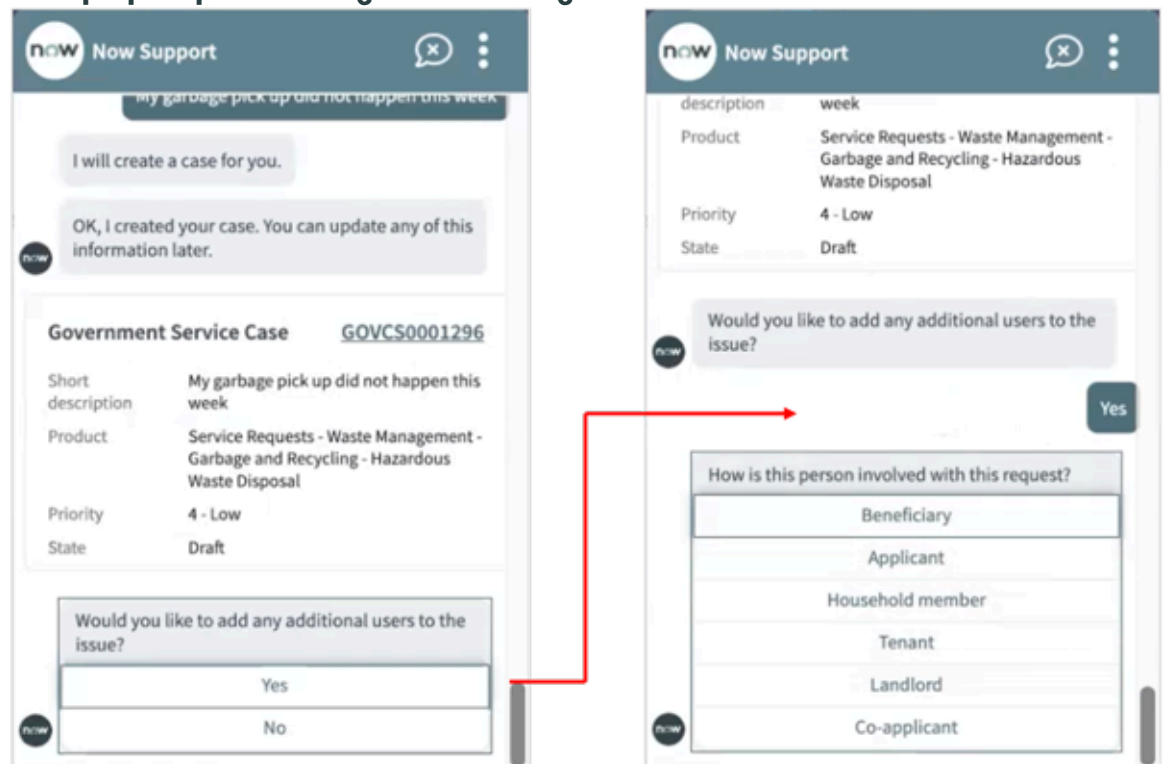
Example of prompt for services



Create Public Sector Additional Members topic block

Use this topic block to let your constituents specify other people, such as family members or other authorized individuals, who can view a case or issue. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

Example prompts for adding members to a government service case



When you use this topic block in a conversation, you specify the input parameters from the originating (calling) topic to the topic block.

Public Sector Additional Members input parameters

Parameter	Description
case_id	sys_id of the public sector case record created.
case_type	Extension of the base public sector service.

To learn more about topic blocks and how to use them in Virtual Agent conversations, see [Maximizing code reuse with topic blocks](#) 

Configure a service for constituent, business, or agency

Configure Public Sector Digital Services service catalog so that you can define the type of public service being offered, the service taxonomy, and which agency offers the service.

Before you begin

Note:

Determine which fields contain sensitive information and how to encrypt them to protect sensitive data.

Role required: admin

Procedure

1. Navigate to **All > Service Catalog > Catalog Definitions > Maintain Categories**.
2. Select **New** or open the catalog item to be edited.
3. On the form, fill in the fields.

Public Services Service Catalog form

Field	Description
Name	Name of the public service.
Catalog	Product category that the service falls under. If blank, select Government Service .
Category	Indicates the type of public service.
Application	Application scope of the service. Select from the following options: ○ Public Sector Digital Services Core ○ License and Permit Playbook ○ Information Request Playbook ○ Service Request Playbook
Status	Status of the public service. Mapped in the active field as: ○ Available = true ○ Not available = false
Short description	Short description of the public service.

Field	Description
Description	Description of the public service.

4. Select **Submit** or **Update**.

Configure Engagement Messenger for Playbooks

Configure certain Engagement Messenger settings to enable public sector end users to create and track requests. With Engagement Messenger, public sector users can access self-service and chat features from third-party web applications outside of the ServiceNow environment.

- Create an Engagement Messenger module. For more information on implementing Engagement Messenger, see [Set up Engagement Messenger](#) .
- Be familiar with customizing the Engagement Messenger module. For details, see [Customize the feature configuration of Engagement Messenger](#) .
- [Activate the Agent Chat plugin](#)  (com.glide.interaction.awa).
- [Activate the Virtual Agent plugin](#)  (com.glide.cs.chatbot), which requires a subscription.
- [Activate the Customer Service Virtual Agent Conversations plugin](#)  (com.sn_csm.virtualagent), which requires a subscription.

Configure Engagement Messenger for Service Request Playbook application

Configure Engagement Messenger settings for creating and tracking non-emergency service requests.

Before you begin

Role required: sn_csm_ec.ec_admin or admin

About this task

Public sector end users can create and track service requests in Engagement Messenger. They can choose from a catalog of pre-packaged service requests that are provided with the Service Request Playbook application. If Virtual Agent is implemented, they can use the pre-built Virtual Agent conversation, Create a Service Request, to submit and update non-emergency service requests from Engagement Messenger. You must enable the Government Service Catalog and this pre-built Virtual Agent conversation in Engagement Messenger.

Procedure

1. In Engagement Messenger, navigate to **All > Engagement Messenger > Modules**.
2. Customize the Catalog feature to use the Government Service Catalog, which provides the pre-packaged, non-emergency services that users can select from when creating a service request.
 - a. From the **Features** section, open the **Catalog** feature.
 - b. Select **Edit** to search for and then add the Government Service Catalog.
3. Customize the Chat feature by enabling the pre-built Virtual Agent conversation for creating a service request.
 - a. From the **Features** section, open the **Chat** feature.
 - b. Under **Reference chat**, find and select the **Create a Service Request** conversation topic.
4. Select **Update**.

Components installed with Public Sector Digital Services Core

Several types of components such as tables, user roles, and flows are installed when you activate the Public Sector Digital Services Core plugin.

The following plugins are activated when you enable the Public Sector Digital Services Core plugin (sn_gsm):

- UI Components for Customer Portals (com.sn_ciwf_ui_cmpnt)
- Agency Support Model (com.sn_agency_support_model)
- Customer Service Case Types (com.snc.csm_case_types)
- Customer Service Portal (com.glide.service-portal.customer-portal)
- Customer Service Install Base Management (com.snc.install_base)

Note:

The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Demo data is available for this feature.

Note:

For information about the roles installed when you activate the Public Sector Digital Services Core plugin, see [Roles installed with Public Sector Digital Services Core](#).

Tables installed

Tables installed with Public Sector Digital Services

Table	Description
Government Service Case [sn_gsm_government_service_case]	Government service case table Note: This table is an extension of the Case [sn_customerservice_case] table.
Constituent Profile [sn_gsm_constituent_profile]	Constituent profile table
Service Definition [sn_case_type_selection_list]	Service-definition table Note: This table is an extension of the Product Model [cmdb_model] table.
Business Registration Request [sn_gsm_business_registration]	Table for a new business registration request

Flows installed

Flows installed with Public Sector Digital Services

Flow	Description
Create blocked by record if Case Task is associated with government case [create_blocked_by_record_if_case_task_is_associated_with_government_case]	Creates a blocked by record if the Case Task is associated with a government case.
Create blocked by record if Government case needs customer information [create_blocked_by_record_if_case_needs_customer_information]	Creates a blocked by record if the Government case needs more customer information.
Resolve blocked by record if Case Task is closed and associated with Government Case [resolve_blocked_by_record_if_case_task_is_closed_and_associated_with_government_case]	Removes the blocked by record for the associated Government case if the Government case is resolved.
Resolve blocked by record if user information is provided for Government case [resolve_blocked_by_record_if_user_information_is_provided_for_govt_case]	Removes the blocked by record if the case task is closed.

Roles installed with Public Sector Digital Services Core

The Public Sector Digital Services Core application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users.

Core Roles

Constituent roles

Role title [name]	Description	Contains roles
constituent [sn_gsm.constituent]	Enables constituents to request services and manage their information, government service cases, and services received.	• sn_install_base.sold_product_authorized_consumer • sn_gsm.service_received_read_granular • sn_customerservice.consumer • sn_gsm.case_write_granular
constituent_agent [sn_gsm.constituent_agent]	Enables agents to perform the following actions:	• sn_gsm.report_viewer • sn_gsm.case_writer • sn_gsm.service_offered_writer • sn_customerservice.consumer_agent

Constituent roles (continued)

Role title [name]	Description	Contains roles
	• Read, write, and update government service cases for all constituents. • Read, write, and update constituent records.	• sn_gsm.constituent_writer • interaction_agent
constituent_contributor [sn_gsm.constituent_contributor]	Enables users to request services and raise government service cases on behalf of any constituent.	• sn_customerservice.consumer_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor
constituent_admin [sn_gsm.constituent_admin]	Provides agents with admin access and enables them to create, read, update, and delete constituent records.	sn_gsm.constituent_writer
constituent_writer [sn_gsm.constituent_writer]	Provides agents with access to create, read, and update constituent records.	sn_gsm.constituent_viewer
License & Permits Install base writer [sn_gsm_lic_prmt.ib_writer]	Provides create, read and write access to Install base items.	sn_gsm_lic_prmt.ib_writer
constituent_viewer [sn_gsm.constituent_viewer]	Provides agents with read-only access to constituent records.	sn_customerservice.customer_data_viewer

Constituent roles (continued)

Role title [name]	Description	Contains roles
License & Permits Install base Item viewer [sn_gsm_lic_prmt.ib_viewer]	This role provides read access to Install base items	sn_gsm.report_viewer

Business roles

Role title [name]	Description	Contains roles
business_contact [sn_gsm.business_contact]	Enables business stakeholders to request services and manage information, government service cases, and services received.	• sn_customerservice.consumer • sn_install_base.sold_product_authorized_consum • sn_gsm.service_received_read_granular • sn_gsm.case_write_granular
business_contact_admin [sn_gsm.business_contact_admin]	Provides a business stakeholder with admin access to a business account. This role has access to all the data within the business account.	• sn_customerservice.customer_admin • sn_gsm.business_contact
business_case_manager [sn_gsm.business_case_manager]	Enables a business stakeholder to manage government service cases for a business account and associated child accounts. This role can perform the following actions:	• sn_customerservice.customer_case_manager • sn_gsm.business_contact

Business roles (continued)

Role title [name]	Description	Contains roles
	• Create a case on behalf of another business contact. • View a list of cases belonging to the business. • Edit cases belonging to the business.	
business_contributor [sn_gsm.business_contributor]	Enables business stakeholders to request services and raise government service cases on behalf of any business.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor
business_partner [sn_gsm.business_partner]	Enables business partners to create, view, and edit government service cases from their own account or from a business account that they are associated with.	• sn_customerservice.partner • sn_gsm.business_contact
business_partner_admin [sn_gsm.business_partner_admin]	Provides a business stakeholder with admin access to a partner account. This user can access all the	• sn_customerservice.partner_admin • sn_gsm.business_partner • sn_gsm.business_contact • sn_gsm.business_contact_admin

Business roles (continued)

Role title [name]	Description	Contains roles
	data within the partner account and the government service cases created by the partners.	
business_agent [sn_gsm.business_agent]	Enables agents to perform the following actions: • Read, write, and update government service cases for all business accounts. • Read, write, and update business records.	• sn_gsm.report_viewer • sn_gsm.case_writer • sn_gsm.service_offered_writer • sn_customerservice.consumer_agent • sn_gsm.business_writer • interaction_agent
Social Benefits Business Contributor [sn_gsm_soc_bnfts.business_contributor]	Enables users to request service and raise Social Benefits cases on behalf of any business. This allows business stakeholders to act as a requester on behalf of customers.	• sn_gsm.business_contributor • sn_gsm_soc_bnfts.contributor_creator

Agency agent roles

Role title [name]	Description	Contains roles
agency_agent [sn_gsm.agency_agent]	Enables agency agents to create and fulfill government service cases for the businesses and business	sn_customerservice.svc_lo

Agency agent roles (continued)

Role title [name]	Description	Contains roles
	contacts associated with the agency.	
agency_constituent_agent [sn_gsm.agency_constituent_agent]	Enables agency agents to create and fulfill government service cases for constituents and households associated with the agency.	sn_customerservice.svc_lo
License & Permit Constituent Agent [sn_gsm_lic_prmt.constituent_agent]	Enables users to work on License & Permit cases for all constituents. It includes the ability to read/write/update all License & Permit cases and constituent records	• sn_gsm.constituent_age • sn_gsm_lic_prmt.case_v • sn_gsm_lic_prmt.report
agency_contributor [sn_gsm.agency_contributor]	Enables agency agents to request services and raise government service cases on behalf of the agency.	• sn_customerservice.serv • sn_gsm.contributor_crea • sn_customerservice.cas
License & Permit Agency Contributor [sn_gsm_lic_prmt.agency_contributor]	Enables users to request service and raise License & Permit cases for their service organization (business location). This role is agnostic to internal and external.	• sn_gsm.agency_contrib • sn_gsm_lic_prmt.contrib
agency_manager [sn_gsm.agency_manager]	Enables an agency manager to perform the following actions: • Create and update government service cases for constituents, households, business, and business contacts. • Manage data for constituents and households associated with the agencies within the agency hierarchy. • Manage data for businesses and business contacts associated with the agencies within the agency hierarchy.	• sn_customerservice.svc • sn_gsm.agency_agent • sn_gsm.agency_constitu
License & Permit Agency Manager [sn_gsm_lic_prmt.agency_manager]	Enables users to manage data for agencies in the manager's agency hierarchy.	• sn_gsm.agency_manag • sn_gsm_lic_prmt.agency • sn_gsm_lic_prmt.agency

Agency agent roles (continued)

Role title [name]	Description	Contains roles
agency_manager_contributor [sn_gsm.agency_manager_contributor]	Enables users to create, update, view, and approve cases. Allows them to register and remove staff across all agencies they manage.	• "sn_gsm.business_contr • sn_gsm.government_ag • sn_gsm.constituent_con • sn_gsm.government_ag • sn_gsm.agency_manage • sn_customerservice.svc
License & Permit Agency Manager Contributor [sn_gsm_lic_prmt.agency_manager_contributor]	Enables users to create, update, view, and approve cases. They can also register and remove staff across all agencies they manage.	• sn_gsm_lic_prmt.busine • sn_gsm_lic_prmt.govern • sn_gsm_lic_prmt.constit • sn_gsm_lic_prmt.agency • sn_gsm_lic_prmt.agency • sn_gsm.agency_manage
relationship_manager [sn_gsm.agency_relationship_manager]	Enables users to view cases across all the external agencies where they have location_relationship_manager responsibility.	• sn_bus_loc.location_rela • sn_gsm.agency_manage
License & Permits Agency Manager Core [sn_gsm_lic_prmt.agency_manager_core]	Granular role to manage agency staff registrations and staff relationships with businesses, constituents, and households for all the agencies within the hierarchy.	• sn_gsm.agency_manage • contract_manager
License & Permit Agency Relationship Manager [sn_gsm_lic_prmt.agency_relationship_manager]	Enables users to view cases across all the external agencies where they have location_relationship_manager responsibility.	• sn_gsm.agency_relation • sn_gsm_lic_prmt.agency
service_manager [sn_gsm.service_manager]	Enables a service manager to perform the following actions: • Manage all work performed by agents working on government service cases. • Read, write, update, and delete all government service cases.	• sn_gsm.service_offered. • sn_gsm.service_offered. • sn_gsm.constituent_age • sn_gsm.constituent_adr • sn_gsm.business_agent

Agency agent roles (continued)

Role title [name]	Description	Contains roles
	Read, write, update, and delete all constituent, business, and agency records.	
License & Permit Case Task Agent [sn_gsm_lic_prmt.case_task_agent]	Provides users the ability to create and fulfill License & Permit cases for the constituents and households in the agent's agency.	- sn_gsm_lic_prmt.contrib - sn_gsm_lic_prmt.case_v - sn_gsm.case_task_agen
License & Permit Agency Business Agent [sn_gsm_lic_prmt.agency_agent]	Enables users to create and fulfill License & Permit cases for the accounts and contacts in the agent's agency.	- sn_gsm.agency_agent' - contract_manager
social_benefits_agency_agent [sn_gsm_soc_bnfts.agency_agent]	Provides users the ability to create and fulfill cases for the accounts and contacts in the agent's agency.	- sn_gsm.agency_agent - decision_table_reader - contract_manager
social_benefits_agency_constituent_agent [sn_gsm_soc_bnfts.agency_constituent_agent]	Provides users the ability to create and fulfill cases for the constituents and households in the agent's agency.	- decision_table_reader - sn_gsm.agency_constitu - contract_manager
social_benefits_agency_contributor [sn_gsm_soc_bnfts.agency_contributor]	Enables users to request service and raise Social Benefits cases for their agency(business location). This role is agnostic to internal and external.	- sn_gsm.government_ag - sn_gsm_soc_bnfts.contri
social_benefits_agency_manager [sn_gsm_soc_bnfts.agency_manager]	Provides users the ability to manage data for agencies in the manager's agency hierarchy.	- sn_gsm_soc_bnfts.agen - sn_gsm_soc_bnfts.agen - sn_gsm.agency_manag - sn_gsm_soc_bnfts.agen
social_benefits_agency_manager_contributor [sn_gsm_soc_bnfts.agency_manager_contributor]	Manage agencies and create a case for a business, household, or constituent at the agency or any child agency.	- sn_gsm_soc_bnfts.agen - sn_gsm_soc_bnfts.busin - sn_gsm_soc_bnfts.agen - sn_gsm_soc_bnfts.cons - sn_gsm.agency_manag

Agency agent roles (continued)

Role title [name]	Description	Contains roles
social_benefits_agency_manager_core [sn_gsm_soc_bnfts.agency_manager_core]	Granular role to manage agency staff registrations and staff relationships with businesses, constituents, and households for all the agencies within the hierarchy.	• sn_gsm.agency_manager • contract_manager
social_benefits_agency_relationship_manager [sn_gsm_soc_bnfts.agency_relationship_manager]	Manages and monitors all the activities performed by the agencies. It also acts as an internal point of contact for the agencies.	• sn_gsm_soc_bnfts.agency_manager • sn_gsm.agency_relationship_manager
social_benefits_business_agent [sn_gsm_soc_bnfts.business_agent]	Provides users the ability to work on Social Benefits cases for business. It includes the ability to read/write/update all Social Benefits cases and business records.	• sn_gsm_soc_bnfts.business_agent • sn_gsm_soc_bnfts.case_task_agent • sn_gsm_soc_bnfts.constituent_agent • sn_gsm_soc_bnfts.reports_reader • sn_gsm_soc_bnfts.relationship_agent • sn_gsm_soc_bnfts.ib_violation_agent
Social Benefits Case Task Agent [sn_gsm_soc_bnfts.case_task_agent]	Enables users to work on Social Benefits case tasks.	• sn_gsm_soc_bnfts.case_task_agent • sn_gsm_soc_bnfts.contract_manager • sn_gsm.case_task_agent
Social Benefits Constituent Agent [sn_gsm_soc_bnfts.constituent_agent]	Provides users the ability to work on Social Benefits cases for all constituents. It includes the ability to read/write/update all cases and constituent records	• sn_gsm_soc_bnfts.case_task_agent • sn_gsm_soc_bnfts.reports_reader • sn_gsm.constituent_agent • sn_gsm_soc_bnfts.ib_violation_agent
Social Benefits Manager [sn_gsm_soc_bnfts.manager]	Provides users the ability to manage all work performed by agents working on Social Benefits cases (constituent and business). Users with this role have the ability to read/write/update/delete all Social Benefits cases and constituent/business records.	• sn_gsm_soc_bnfts.ib_violation_agent • sn_gsm_soc_bnfts.business_agent • sn_gsm.government_seeker • sn_gsm_soc_bnfts.constituent_agent • sn_majorissue_mgt.major_issue_agent
Social Benefits Relationship Agent [sn_gsm_soc_bnfts.relationship_agent]	Enables users to work on Social Benefits cases only for customers with whom they have relationships.	• sn_gsm_soc_bnfts.reports_reader • decision_table_reader • sn_gsm.relationship_agent • contract_manager

Admin and other roles

Role title [name]	Description	Contains roles
admin [sn_gsm.admin]	Provides a user with delegated admin access to scoped applications created on the Public Sector Digital Services platform.	sn_gsm.service_manager
service_offered_admin [sn_gsm.service_offered_admin]	Provides users with admin access and enables them to create, read, update, and delete services-offered records and services-received records.	sn_gsm.service_offered_writer
license_permit_admin [sn_gsm.lic_prmt.admin]	Enables users to manage all work performed by agents working on License & Permit cases (constituent and business). Users with this role have the ability to read/write/update/delete all License & Permit cases and constituent/	• sn_gsm.lic_prmt.manager • sn_gsm.admin

Admin and other roles (continued)

Role title [name]	Description	Contains roles
	business records.	
social_benefits_admin [sn_gsm_soc_bnfts.admin]	Provides delegated admin access to scoped applications created on the Social Benefits Playbook.	• sn_gsm.admin • sn_gsm_soc_bnfts.manager
License & Permits Install base admin [sn_gsm_lic_prmt.ib_admin]		
service_offered_admin [sn_gsm.service_offered_admin]		
service_offered_writer [sn_gsm.service_offered_writer]	Provides users with access to create, read, and update services-offered records and services-received records.	sn_gsm.service_offered_viewer
service_offered_viewer [sn_gsm.service_offered_viewer]	Provides users with read-only access to services offered records and services-received records.	sn_customerservice.customer_data_viewer
case_writer [sn_gsm.case_writer]	Provides agents with access to create, read, and update government service cases.	sn_gsm.case_viewer

Admin and other roles (continued)

Role title [name]	Description	Contains roles
case_viewer [sn_gsm.case_viewer]	Provides agents with read-only access to government service cases.	None
contributor_creator [sn_gsm.contributor_creator]	Enables agents or business stakeholders to create government service cases and is included in the top-level contributor roles. This role can create cases but cannot view other cases.	None
relationship_agent [sn_gsm.relationship_agent]	Enables agents to work on government service cases for customers that they have relationship with.	• sn_gsm.report_viewer • sn_customerservice.relationship_agent
relationship_contributor [sn_gsm.relationship_contributor]	Enables business stakeholders to raise government service cases on behalf of customers that they have relationship with.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor

Admin and other roles (continued)

Role title [name]	Description	Contains roles
Social Benefits Case Viewer [sn_gsm_soc_bnfts.case_viewer]	This role provides users read only access to Social Benefits Case records.	• sn_gsm.case_viewer • decision_table_reader
Social Benefits Case Writer [sn_gsm_soc_bnfts.case_writer]	This role provides users access to create, read and update Social Benefits Case records.	• sn_gsm_soc_bnfts.case_viewer • sn_gsm.case_writer • contract_manager

Granular roles

You can use predefined functional and granular roles installed with Public Sector Digital Services to establish relationships between users and public sector entities. These functional and granular roles provide different levels of access to public sector data, to help maintain data security.

- Functional roles: A set of roles required to perform a function or meaningful action that requires access on multiple entities.
- Granular roles: Roles that provide access to cases, services used, and related public sector entities. One or more granular roles can be bundled together as a functional role.

A granular model helps protect data by granting the appropriate level of access to the corresponding public sector entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine users' access to certain information. You can have fine-grained access control by setting granular policies that authorize individuals to access the information needed to work efficiently and effectively, ultimately helping improve the constituent experience.

For example, if you extend the Government Service Case table or other tables in the Public Sector Digital Services app, you must replicate the access control lists for the extended tables. You can assign granular roles to public sector users to control access to those extended tables.

Granular roles

Role title [name]	Description	Contains roles
case_create_granular [sn_gsm.case_create_granular]	Provides constituents or business stakeholders with granular create access	sn_gsm.case_read_granular

Granular roles (continued)

Role title [name]	Description	Contains roles
	to government service cases.	
case_read_granular [sn_gsm.case_read_granular]	Provides constituents or business stakeholders with granular read access to government service cases.	sn_customerservice.case_read_granular
case_write_granular [sn_gsm.case_write_granular]	Provides constituents or business stakeholders with granular write access to government service cases.	• sn_gsm.case_create_granular • sn_gsm.case_read_granular
service_received_read_granular [sn_gsm.service_received_read_granular]	Provides constituents or business stakeholders with granular read access to services-received records.	sn_install_base.sold_product_read_granular
License & Permits Install base read granular [sn_gsm_lic_prmt.ib_read_granular]	Provides granular read access to issued License and Permits.	sn_install_base.install_base_read_granular
License & Permits Agency Manager Core [sn_gsm_lic_prmt.agency_manager_core]	Granular role to manage agency staff registrations and staff relationships with businesses, constituents, and households for all the agencies within the hierarchy.	• sn_gsm.agency_manager_core • contract_manager
License & Permits Contributor Creator [sn_gsm_lic_perm.contributor_creator]	Enables users to create government service cases	sn_gsm.contributor_creator

Granular roles (continued)

Role title [name]	Description	Contains roles
	and is included in the top-level contributor roles. It only allows record creation but does not allow visibility to a record on its own.	
Social Benefits install base admin [sn_gsm_soc_bnfts.ib_admin]	This role provides create,read,write and delete access to Install base items	sn_gsm_soc_bnfts.ib_writer
Social Benefits install base read granular [sn_gsm_soc_bnfts.ib_read_granular]	Provides granular read access to issued Social Benefits.	sn_install_base.install_base_read_granular
Social Benefits install base viewer [sn_gsm_soc_bnfts.ib_viewer]	Provides read access to Install base items.	None
Social Benefits install base writer [sn_gsm_soc_bnfts.ib_writer]	Provides create, read and write access to Install base items.	sn_gsm_soc_bnfts.ib_viewer

Business Stakeholder Roles

Business Stakeholder for Public Sector Digital Services includes plugins and roles that provide access to business stakeholder features.

Admins with access to Business Stakeholder can provide Business Stakeholder users with the rights to the following actions:

- Create cases on behalf of a business or an agency (service organization)
- View cases, case tasks, and business data.
- Approve requests.

Create cases on behalf of customers

Role	Description	Contains roles	Plugin	User type
Constituent contributor [sn_gsm.constituent_contributor]	Enables users to request services and raise government service cases	• sn_customerservice.consumer_contributor • sn_gsm.contributor_creator	com.sn_public_sector_digital_services_core	external

Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
	on behalf of any constituent.			
License & Permit Constituent contributor [sn_gsm.lic_prmt.constituent_contributor]	This role enables users to request for service and raise License & Permit cases on behalf of any constituent. This allow business stakeholders to act as a requestor on of behalf of customers.	• sn_gsm.constituent_contributor • sn_gsm.lic_prmt.contributor_creator		
Business contributor [sn_gsm.business_contributor]	Enables business stakeholders to request services and raise government service cases on behalf of any business.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator	com.sn.public.sectordigitalandservices_core external	
License & Permit Business Contributor [sn_gsm.lic_prmt.business_contributor]	This role enables users to request for service and raise License & Permit cases on behalf of any business. This allow business stakeholders to act as a requester on of behalf of customers.	• sn_gsm.business_contributor • sn_gsm.lic_prmt.contributor_creator		
Relationship contributor [sn_gsm.relationship_contributor]	Enables business stakeholders to raise government service cases on behalf of customers with which they have a relationship.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator	com.sn.public.sectordigitalandservices_core external	
License & Permit Relationship Contributor [sn_gsm.lic_prmt.relationship_contributor]	Enables users to raise License & Permit cases on behalf of customers with whom they have	• sn_gsm.relationship_contributors • n_gsm.lic_prmt.contributor_creator		

Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
	relationships. This allows business stakeholder access to act as a requester on behalf of customers.			
Social Benefits Constituent Contributor [sn_gsm_soc_bnfts.constituent_contributor]	This role enables users to request service and raise Social Benefits cases on behalf of any constituent. This allows business stakeholders to act as a requestor on behalf of customers.	• sn_gsm.constituent_contributor • sn_gsm_soc_bnfts.contributor_creator		
Social Benefits Contributor Creator [sn_gsm_soc_bnfts.contributor_creator]	Enables users to create Social Benefits cases and is included in the top-level contributor roles. It only allows record creation but does not allow visibility to a record on its own.	• sn_gsm.constituent_contributor • sn_gsm_soc_bnfts.contributor_creator		
Social Benefits Contributor Editor [sn_gsm_soc_bnfts.contributor_editor]	Grants restrictive write access to the fields on the Social Benefits Case form.	sn_gsm.contributor_creator		
Social Benefits Relationship Contributor [sn_gsm_soc_bnfts.relationship_contributor]	Enables users to raise Social Benefits cases on behalf of customers with whom they have relationships. This allows business stakeholder access to act as a requester	• sn_gsm.relationship_contributor • sn_gsm_soc_bnfts.contributor_creator		

Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
	on behalf of customers.			

Create cases on behalf of agencies

Role	Description	Contains roles	Plugin	User type
Agency contributor [sn_gsm.agency_contributor]	Enables agency agents to request services and raise government service cases on behalf of the agency.	- sn_customerservice.organization_contributor - sn_gsm.contributor_creator (or sn_agency_support_model)	Agency Support Model	Internal and external

View cases, case tasks, and customer data

Role	Description	Contains roles	Plugin	User type
Case viewer [sn_gsm.case_viewer]	Provides agents with read-only access to government service cases.	None	com.sn_public_sector_digital_services_core	
Constituent viewer [sn_gsm.constituent_viewer]	Provides agents with read-only access to constituent records.	sn_customerservice.constituent_viewer	com.sn_public_sector_digital_services_core	
Business viewer [sn_gsm.business_viewer]			com.sn_public_sector_digital_services_core	
Services offered viewer [sn_gsm.service_offered_viewer]	Provides users with read-only access to services offered records and services received records.	sn_customerservice.constituent_viewer	com.sn_public_sector_digital_services_core	
Government services received viewer [sn_gsm.service_received_viewer]	Provides users with read-only access to services received records.		com.sn_public_sector_digital_services_core	Internal

View reports and dashboards

Role	Description	Contains roles	Plugin	User type
report_viewer [sn_gsm.report_viewer]	Enables users to view reports on the Public Sector Digital Services platform.	None	com.sn_public_sector_digital_services_core	
License & Permit Report Viewer [sn_gsm_lic_prmt.report_viewer]	Enables users to view reports on the Public Sector Digital Services platform.	sn_gsm.report_viewer		
social_benefit_report_viewer [sn_gsm_soc_bnfts_report_viewer]	Provides users access to view reports on Social Benefits Playbook.	sn_gsm.report_viewer		

Note:

Customers who have purchased a Public Sector Digital Services subscription can provide Business Stakeholder users with rights to actions listed under [Business Stakeholder for Customer Service Management](#).

Persona-based Roles in Public Sector Digital Services

Roles and personas help you to understand the different roles involved in Public Sector Digital Services.

Public Sector Digital Services supports users with the following basic job functions (personas).

Personas are defined as the individual roles that perform different tasks in Public Sector Digital Services.

Public Sector Personas

Job function	Description
Admin	System administrator, who has access to all system features, functions, and data, regardless of security restraints: - Administers specific scoped apps built using different case types. - Manages the information for constituents.
Constituent	End user, such as a citizen, residents, visitors, veterans: - Requests services from government agencies. - Tracks resolution of requests.
Business stakeholder	End user, such as business owner, business contact, business partner: - Requests services from government agencies. - Tracks resolution of requests.

Public Sector Personas (continued)

Job function	Description
Government agent	Fulfiller, such as constituent agent, business agent, agency agent: • Works on government service cases for all constituents. Can read, write, and update all government service cases and profile records. • Can belong to specific teams or agencies. • Can work on specific case types (for example Licenses or Unemployment).
Contributor	Business stakeholder or requester for constituents: • Help constituents or businesses with services that they need. • Submits requests on behalf of constituents and acts as proxy.
Government service manager	Manager of constituent and business services and agents supporting constituent services: • Administers services delivered to constituents, business stakeholders, and agency. • Can read, write, update, and delete all government service cases. • Can read, write, update, and delete all constituent, business, and agency records. • Improves service delivery and constituent satisfaction.

Install the Analytics and Reporting Solution for Public Sector Digital Services

Install the content pack for the Public Sector Digital Services from the ServiceNow Store.

Before you begin

- Activate the full, subscription version of Performance Analytics on the instance where you are activating this Platform Analytics Solution. You can activate Performance Analytics on a non-production instance without purchasing a subscription. For more information, see [Activate your Performance Analytics subscription](#) .
- Install Public Sector Digital Services Core from the ServiceNow Store.

Role required: admin

Procedure

1. Navigate to **All > System Applications > All Applications > ServiceNow Store**.
2. Browse for Performance Analytics Content Pack for Public Sector Digital Services and verify that you have the necessary valid entitlements.

A HI account and permission to request applications is necessary for installing the Performance Analytics Content Pack for the instance in question. The HI account and the instance must be part of the same company. For more information, see [Install a ServiceNow Product](#)  on the ServiceNow Store.

3. Search for Performance Analytics Content Pack for Public Sector Digital Services.
4. Install the application.

Install and configure playbooks in Public Sector Digital Services

Install one or more playbook applications available for use with Public Sector Digital Services. You can then configure the features available for submitting requests and routing requests to agents.

The following applications are available with Public Sector Digital Services that enable you to create and use playbooks. For more information on installing and configuring each playbook, see the following corresponding pages.

Social Benefits Playbook

Provides an end-to-end workflow for handling applications for social benefit programs.

License and Permit Playbook

Provides an end-to-end workflow for handling license and permit requests.

Information Request Playbook

Provides an end-to-end workflow for handling public record and information requests.

Service Request Playbook

Provides an end-to-end workflow for handling non-emergency service requests.

Install and configure the Service Request Playbook application

Install the Service Request Playbook application, which enables public sector end users to submit and track non-emergency service requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the Service Request Playbook, after you install the [Public Sector Digital Services Core](#) application.

Configuration tasks for Service Request Playbook

Task	Description
Install Service Request Playbook application	Install Service Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Automatically route service requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector service requests to designated agents.
Configure Engagement Messenger for Playbooks	Configure certain Engagement Messenger settings that enable public sector end users to create and track non-emergency service requests from Engagement Messenger.
Enable public sector end users to create a service request using Virtual Agent	Use Virtual Agent Designer to publish the pre-built conversation topic, Create a Service

Configuration tasks for Service Request Playbook (continued)

Task	Description
	Request , which enables end users to submit a service request using the Virtual Agent chatbot.
Configure the Similar Records Activity UI in Service Request Playbook	View a list of similar requests by location, without having to search for the requests or leave the playbook.
Configure Mobile Agent for Service Request Playbook	(Optional) Install the Customer Service Mobile and Service Request Playbook plugins to enable government service agents to track non-emergency service requests on the Mobile Agent.

Install Service Request Playbook for Public Sector Digital Services

You can install the Service Request Playbook application (sn_gsm_srvc_req) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#) .
- Certain features in the Service Request Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

Note:

Install the [Playbooks for Customer Service Management](#)  application to enable the playbook experience.

- Review the [Service Request Playbook](#)  application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Service Request [sn_gsm_service_request_case] table is installed with Service Request Playbook.

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Service Request Playbook application (sn_gsm_srvc_req) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Automatically route service requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector service requests, such as non-emergency requests, to designated agents.

The Service Request Playbook application provides the following items that are used in AWA to automatically route and assign public sector service requests:

- **Service Requests service channel** - The default service channel for routing incoming public sector service requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector Requests assignment group** - The default assignment group that identifies the agents handling public sector service requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Service Requests queue** - The default queue to which public sector service requests are routed.
- **Inbox layouts** - The default card layouts for service request items displayed in the agent inbox view of CSM Configurable Workspace:
 - **Constituent Service Request layout:** Includes **Short description**, **Constituent**, and **Service** fields.
 - **Business Service Request layout:** Includes **Short description**, **Business**, **Business Contact**, and **Service** fields.
 - **Generate Service Request Layout:** Displayed when anonymous users submit service requests. Includes **Short description** and **Service** fields

As an admin, you can enable and disable Advanced Work Assignment for Service Request cases, as well as change the default attributes for the Service Requests service channel, such as the related assignment group and queue settings. For details, see [Configure Service Requests service channel](#).

Configure Service Requests service channel

Change the default Service Requests service channel attributes in Advanced Work Assignment to control how public sector service requests are routed and assigned to government agents.

Before you begin

- [Activate the Advanced Work Assignment plugin \(com.glide.awa\)](#) .
- [Activate the Agent Chat plugin \(com.glide.interaction.awa\)](#) .
- [Install the Service Request Playbook application](#).

Role required: awa_admin or admin

About this task

You can modify the context and attributes for [service channels](#)  in AWA. For the Service Requests service channel, use the Public Sector Requests assignment group to specify the agents handling service requests. You can also add advanced conditions to filter the routing conditions in the Service Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Service Requests service channel by modifying the default attributes as needed.

Configure Mobile Agent for Service Request Playbook

Install the Customer Service Mobile and Service Request Playbook plugins to enable government service agents to track non-emergency service requests on the Mobile Agent. You can then configure the roles.

As a user with the admin role, complete the following configuration tasks to set up the Mobile Agent application.

Admin Tasks for Mobile Agent app configuration

Task	Description
Install Service Request Playbook application	Install Service Request Playbook (sn_gsm) from the ServiceNow® Store.
Activate the Customer Service Mobile plugin (com.sn_csm_mobile)	You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) using the Customer Service Management guided setup.
(Optional) Activate Field Service Management  plugin (com.snc.work_management)	Install the Field Service Management plugin to view the work orders related list. For more information, see Integration with Field Service Management .
Configure public sector roles and permissions for Mobile Agent app	Configure user roles in order for government service agents to access the Mobile Agent app. This step is mandatory for any government service agent to be able to work from the app.

Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Mobile Agent on their mobile devices and access ServiceNow instances.

Configure public sector roles and permissions for Mobile Agent app

Configure user roles for government service agents to access the Mobile Agent app. This step is mandatory for any government service agent to be able to work from the app.

Before you begin

Role required: admin

Procedure

1. In the navigation filter, enter **sys_sg_applet_launcher.list** to open the Applet Launchers [sys_sg_applet_launcher] table.
2. From the Launcher screens table, select the **Cases** record.
The Required Roles record should contain only the Customer Service Agent (sn_customerservice_agent) role.
3. **Optional:** If prompted, switch from the Global application to the Customer Service Mobile application.
4. Select the edit icon () under Required Roles and add the following roles:
 - sn_gsm.agency_manager
 - sn_gsm.government_service_manager
 - sn_gsm.constituent_agent
 - sn_gsm.business_agent
 - sn_gsm.agency_constituent_agent
 - sn_gsm.agency_agent
5. Select **Done** to save the roles.
Agents with the above roles can now log in to the Mobile Agent and work on Service Request cases assigned to them.

Configure a service definition for Playbooks in Public Sector Digital Services

Create a service definition for use with Playbooks in Public Sector Digital Services.

Before you begin

Role required: admin

About this task

Service definitions are records used to store details about a service that is available to end customers. You can create service definitions for each public service offered by your government agency.

After upgrade to Public Sector Digital Services v8.0, Services Offered, an extension of Product Model, will no longer be used to model government services. Services Received, an extension of Sold Product, will no longer be used to model the government services that have been granted/delivered to constituents. The Service Definition table will be used to model all public services offered by governments. The following fields from the Service Offered table will be removed and replaced with Service Model fields:

- Type
- Status
- Number
- Period Start Date
- Period End Date

- Jurisdiction
- Category
- Subcategory
- Payment source

i Important:

When upgrading to Vancouver, any data in the Services Offered and Services Received tables will need to be manually migrated into the Service Definition table. You can do so by creating a Service Definition for each entry in the Services Offered table. Services Offered and Services Received data will not be accessible within the application until this step is completed. This is an optional task for previous releases.

Procedure

1. Navigate to **All > Customer Service > Administration > Service Definitions**.
2. Select **New**.
3. Enter the details for the Service Definition.

Service definition form

Field	Description
Name	Name of the service definition.
ID	System-generated unique identifier for the service definition.
Task type	Table associated with the service definition. Select a case or task table based on the service.
View	View to load for the selected service.
Template	Field values that should be defaulted on the form when a case or task is created.
Category	Service definition category for a public service.

4. Select **Submit** or **Update**.
5. Select the new Service Definition Record.
6. In the Default Table Values field, select **Service Definition**.
7. Select the search icon , and select the new Service definition in the choice menu.
8. Select **Submit**.
The service definition is now created and can be used with any of the playbooks in Public Sector Digital Services.

Configure a custom playbook in Service Request Playbook

Custom playbooks and service definitions enable you to customize the default Service Request Playbook user experience to interact with your desired agency workflows. After creating a service definition, you can associate a playbook with the definition.

Before you begin

Role required: admin

About this task

Before starting this procedure, you must create a service definition to associate your playbook with. For more information on how to create a service definition, see [Configure a service definition for Playbooks in Public Sector Digital Services](#).

When the agent selects **Create Case** on the case type selector screen, the system displays the new case record and launches the playbook associated with the service in a tab on the record page.

Note:

This is an optional task.

Procedure

1. Navigate to **All > Process Automation > Workflow Studio**.
2. Select **Create a New Process**, fill in the details of the playbook, and select **Select a trigger**.
3. Select a trigger type from the dropdown menu.
Your trigger type is the service definition you recently created.
4. Select **Go to Designer**.
Workflow Studio is now opened.
5. Select **Activate** after creating the process to your specifications.
The playbook is now published to run when triggered.
6. Navigate to **All > System UI > UI Policies**.
You are taken to edit the UI of the Playbook Record Generator, which is the initial form an agent sees when they are creating a case.
7. Select **New**.
8. Select **Service Request** in the **Table** dropdown menu, and enter a short description describing your new UI policy.
9. Add the necessary conditions under the **When to Apply** and **Script** tabs, and select **Submit**.
Your UI policy and playbook are now created.

Configure the Similar Records Activity UI in Service Request Playbook

The Similar Records Activity UI uses the name and description of existing cases to display a list of cases associated with the current case, allowing an agent to determine whether the current case is a duplicate of an existing case. Similar records can also provide helpful information about a current case.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Workflow Studio**.
2. Select **Service Request**.
3. Under Intake, select **Add Activity**.
4. Select **Playbooks for Customer Service Management > Similar Records**
5. Under When to Start, select **With Previous** from the dropdown.
6. Select **View all properties**, then **Automation**.

7. Select the arrow next to Record, and select **Trigger- Service Request > Service Request Record**.
8. Under Conditions, select **Stage > is not > Intake**.
9. Toggle **Advanced** in the top right corner of the screen.
10. Select **Experience**, and set the associated table to "Service Request".
11. Set the associated record to **Trigger- Service Request > Service Request Record**
12. **Optional:** To set parameters for.
13. Set the title to **This activity > Label**.
14. Select **Done**, then select **Activate**.

Result

The Similar Records UI activity is now configured, and the modal should now display when you open a new or existing Service Request Playbook.

Install and configure the Information Request Playbook application

Install the Information Request Playbook application, which enables public sector end users to submit and track public record requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the Information Request Playbook, after you install the [Public Sector Digital Services Core](#) application.

Configuration Tasks for Information Request Playbook

Task	Description
Install Information Request Playbook for Public Sector Digital Services	Install Information Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Automatically route service requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector information requests to designated agents.
Configure Restricted Caller Access privilege settings in Public Sector Digital Services	You can use a requested RCA to grant store apps access to protected resources in the ServiceNow AI Platform® without the need to wait for the next family release. If you have the system admin or application admin role, you can review requested RCAs and approve and deny them.
Create or edit a legal, review, or final review assignment group	Create a legal, review, or final review assignment agent group for the final review steps of an Information Request.
Configure the Manage documents activity UI in Information Request Playbook	Create documents, search for documents with the auto-complete name lookup, and link or unlink existing documents to a case, all from one modal within the playbook.

Configuration Tasks for Information Request Playbook (continued)

Task	Description
Configure Similar Request Documents UI in Information Request Playbook	Search documents from similar cases, preview multiple sets of documents at one time, and link or unlink documents to or from the case from one modal, without having to leave the playbook.
Configure Mobile Agent for Information Request Playbook	(Optional) Install the Customer Service Mobile and Information Request Playbook plugins to enable agents to view and track information requests on the Mobile Agent.

Install Information Request Playbook for Public Sector Digital Services

You can install the Information Request Playbook application (sn_gsm_info_req) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Certain features in the Information Request Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

Note:

Install the [Playbooks for Customer Service Management](#) application to enable the playbook experience.

- Review the [Information Request Playbook](#) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Information Request [sn_gsm_information_request] table is installed with Information Request Playbook.

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Information Request Playbook application (sn_gsm_info_req) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Automatically route information requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign information requests, such as public records requests, to designated agents.

The Information Request Playbook application provides the following items that are used in AWA to automatically route and assign public sector information requests:

- **Information Request service channel** - The default service channel for routing incoming public sector information requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector Information Request assignment group** - The default assignment group that identifies the agents handling public sector information requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector Information Requests queue** - The default queue to which public sector information requests are routed.
- **Inbox layouts** - The default card layouts for information request items displayed in the agent inbox view of CSM Configurable Workspace:
 - **Constituent Information Request layout:** Includes **Short description**, **Constituent**, and **Service** fields.
 - **Business Information Request layout:** Includes **Short description**, **Business**, **Business Contact**, and **Service** fields.
 - **Generic Information Request layout:** Includes **Short description** and **Service** fields.

As an admin, you can enable and disable Advanced Work Assignment for Information Request cases, as well as change the default attributes for the Information Requests service channel, such as the related assignment group and queue settings. For details, see [Configure Information Requests service channel](#).

Configure Information Requests service channel

Change the default Information Requests service channel attributes in Advanced Work Assignment to control how public sector information requests are routed and assigned to government agents.

Before you begin

- [Activate the Advanced Work Assignment plugin \(com.glide.awa\)](#) .
- [Activate the Agent Chat plugin \(com.glide.interaction.awa\)](#) .
- [Install the Information Request Playbook application](#).

Role required: sn_gsm_info_req.admin, awa_admin, admin

About this task

You can modify the context and attributes for [service channels](#) in AWA. For the Information Requests service channel, use the Public Sector Requests assignment group to specify the agents handling information requests. You can also add advanced conditions to filter the routing conditions in the Information Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Information Requests service channel by modifying the default attributes as needed.

Configure Mobile Agent for Information Request Playbook

Install the Customer Service Mobile and Information Request Playbook plugins to enable government agents to track public record information requests on the Mobile Agent. You can then configure the roles.

As an admin, complete the following configuration tasks to set up the Mobile Agent application.

Admin Tasks for Mobile Agent app configuration

Task	Description
Install Information Request Playbook application	Install Information Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Activate the Customer Service Mobile plugin (com.sn_csm_mobile)	You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) using the Customer Service Management guided setup.
Configure public sector roles and permissions for Mobile Agent app	Configure user roles in order for government agents to access the Mobile Agent app. This step is mandatory for any government agent to be able to work from the app.

Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Mobile Agent on their mobile devices and access ServiceNow instances.

Create or edit a legal, review, or final review assignment group

Create or edit a legal, review, or final review assignment group for Information Requests.

Create an assignment group

Create a legal, review, or final review assignment group for Information Requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > User Administration > Groups**.
2. Select **New**.
3. On the form, fill in the fields.

Assignment groups form

Field	Description
Name	Name of the assignment group.
Manager	Group manager or lead.
Type	Category for this group. In the Select target record field, search for OT to add it to the type field.
Group email	Group email distribution list or the email address of the point of contact.
Parent	Other group that the group is a member of.
Description	Description of the assignment group.

4. Select **Submit**.

Edit an assignment group

Edit a legal, review, or final review assignment group for Information Requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > User Administration > Groups**.
2. Select the group you wish to edit.
3. Select **Group Members**
4. Select **New**
5. On the form, fill in the fields.

Assignment group members form

Field	Description
User ID	User ID of the user you are adding to the group.
Name	Name of the user you are adding to the group.
Title	Title of the user you are adding to the group.
Department	Department of the user you are adding to the group.
Phone	Phone number of the user you are adding to the group.

Field	Description
Password needs reset	When checked, enforces a password reset upon the user at the next login.
Locked Out	When checked, prevents the user from logging in.
Web service access only	When checked, the user cannot log in to an instance or a service portal, connect through single-sign-on, or use their credentials to log into ServiceNow UI.
Internal Integration User	When checked, allows users to bypass the WS-Security authentication requirement.
Geolocation Tracked	When checked, enables location tracking for the specified user.
Location	The physical location of the user.

6. Select **Submit**.

Configure Restricted Caller Access privilege settings in Public Sector Digital Services

Define cross-scope access to an application, application resource (such as an access control role, a business rule, a UI action, or a script include), or event. You can use a requested RCA to grant store apps access to protected resources in the ServiceNow AI Platform without the need to wait for the next family release.

About this task

If you have the system admin or application admin role, you can review requested RCAs and approve and deny them. You can even use these settings to allow or deny requests for access.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Case Types > Manage Case Types**.
2. Validate there is a record for Information Request and the short description is 'Manage requests for FOIA/public records.'
3. Create a case from a list in Workspace and validate the fields are populated correctly.

Configure the Manage documents activity UI in Information Request Playbook

Configure the Manage Documents activity UI in Information Request Playbook to allow agents to view, link, or unlink documents to an information request case.

Before you begin

This task requires the Document Management [com.snc.platform_document_management] plugin to be active on your instance. If Document Management [com.snc.platform_document_management] is not active on your instance, see [Activate a plugin](#) for instructions.

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Workflow Studio**.
2. Select **Information Request**.
3. Under Intake, select **Add Activity**.
4. Select **Playbooks for Customer Service Management > Manage Documents List**.
5. Select the edit button, and rename the action to **Manage Documents**.
6. Under When to Start, select **Immediately**.
7. Select **View All Properties** to set the trigger and edit other configurations.
8. In the top right corner of the screen, select the Advanced button to toggle it on.
The Experience tab should now display.
9. Select **Automation**.
10. Under Record, select **Trigger- Information Request > Information Request Record**.
11. Under Conditions, select **State Is New**, then select Done.
12. Select Experience.
13. Under Associated table, select **Information Request**, and under Associated Record, select **Trigger- Information Request > Information Request Record**.
14. Under Title, select **This Activity > Label**.
15. Select **Done**, then **Activate**.

Result

The Manage Documents UI activity is now configured, and the modal should now display when you open a new or existing Information Request Playbook.

Configure Similar Request Documents UI in Information Request Playbook

The Similar Request Documents Activity UI uses the name and description of existing information request cases to display a list of documents associated with the current case, providing helpful information the documents used to resolve similar information requests in Information Request Playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Workflow Studio**.
2. Select **Information Request**.
3. Under Intake, select **Add Activity**.
4. Select **Playbooks for Customer Service Management > Similar Documents**.
5. Select the edit button, and rename **Similar Documents** to **Similar Request Documents**.
6. Under When to Start, select **Immediately**.
7. Select **View All Properties** to set the trigger and edit other configurations.
8. In the top right corner of the screen, select the Advanced button to toggle it on.
The Experience tab should now display.
9. Select **Automation**.
10. Under Record, select **Trigger- Information Request > Information Request Record**.

11. Under Conditions, select **State Is New**.
12. Select the Experience tab.
13. Under Associated table, select **Information Request**, and under Associated Record, select **Trigger- Information Request > Information Request Record**.
14. Under Related Record Encoded Query, enter **state=3**.
15. Under Title, select **This Activity > Label**.
16. Select **Done**, then **Activate**.

Result

The Similar Documents UI activity is now configured, and the modal should now display when you open a new or existing Information Request Playbook.

Install and configure the License and Permit Playbook application

Install the License and Permit Playbook application, which enables public sector end users to submit and track license and permit requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the License and Permit Playbook, after you install the [Public Sector Digital Services Core](#) application.

Configuration tasks for License and Permit Playbook

Task	Description
Install License and Permit Playbook for Public Sector Digital Services	Install License and Permit Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Configure service definition catalog items for License and Permit Playbook application	The Services Offered and Services Received tables have been migrated into the Service Definition table. All Services Offered data must be converted into individual Service Definitions. For more information, see Services Offered and Services Received Migration Guidance .
Enable public sector end users to create a License or Permit request using Virtual Agent	Use Virtual Agent Designer to publish the pre-built conversation topic, Start a License/ Permit Application , which enables end users to submit a license or permit request using the Virtual Agent chatbot.
Automatically route license and permit requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign license and permit requests to designated agents.
Configure E-sign in License and Permit Playbook	Configure E-sign to allow constituents the option of drawing their signature when they submit cases through the Government Service Portal.
Configure Eligibility Checklist UI in License and Permit Playbook	Configure the eligibility checklist UI to allow agents to confirm whether an applicant is

Configuration tasks for License and Permit Playbook (continued)

Task	Description
	eligible for the specific license or permit requested.
Configure decision tables for License and Permit Playbook	Use decisions tables to simplify the pricing configuration of a license or permit request that depends on multiple factors. Decision tables provide a single point where you can create, view, and modify pricing and dependent attributes.
Append price to Pricing Attribute label	Prices are appended to all Boolean Price Attributes by default. Client scripts must added for any price choice attributes or price control attributes.
Create Document Templates for License and Permit Playbook	Use the Document Templates application to generate templates for various types of Licenses and Permits issued through the License and Permit Playbook.

Install License and Permit Playbook for Public Sector Digital Services

You can install the License and Permit Playbook application (sn_gsm_lic_prmt) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plug-ins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Certain features in the License and Permit Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plug-ins.

Note:

Install the [Playbooks for Customer Service Management](#) application to enable the playbook experience.

- Review the [License and Permit Playbook](#) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The License and Permit Request [sn_gsm_license_permit_case] table is installed with License and Permit Playbook.

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the License and Permit Playbook application (sn_gsm_lic_prmt) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install.**

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.

Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install.**

Automatically route license and permit requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign license/permit requests to designated agents.

The License and Permit Playbook application provides the following items that are used in AWA to automatically route and assign license/permit requests:

- **License and Permit Request service channel** - The default service channel for routing incoming public sector license/permit requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector License and Permit Request assignment group** - The default assignment group that identifies the agents handling public sector license/permit requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector License and Permit Requests queue** - The default queue to which public sector license/permit requests are routed.
- **Inbox layouts** - The default card layouts for license/permit request items displayed in the agent inbox view of CSM Configurable Workspace:
 - **Constituent License/Permit Layout:** Includes **Short description**, **Constituent**, and **Case Type** fields.
 - **Business License/Permit Layout:** Includes **Short description**, **Business**, **Business Contact**, and **Case Type** fields.

As an admin, you can enable and disable Advanced Work Assignment for License/Permit Request cases, as well as change the default attributes for the License/Permit Requests service channel, such as the related assignment group and queue settings. For details, see [Configure License and Permits Requests service channel](#).

Configure License and Permits Requests service channel

Change the default License and Permit Requests service channel attributes in Advanced Work Assignment to control how public sector license and permit requests are routed and assigned to government agents.

Before you begin

- [Activate the Advanced Work Assignment plugin \(com.glide.awa\)](#) .
- [Activate the Agent Chat plugin \(com.glide.interaction.awa\)](#) .
- [Install the License and Permit Request Playbook application.](#)

Role required: awa_admin, admin

About this task

You can modify the context and attributes for [service channels](#)  in AWA. For the License and Permit Requests service channel, use the Public Sector Requests assignment group to specify the agents handling license and permit requests. You can also add advanced conditions to filter the routing conditions in the License and Permit Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the License and Permits Requests service channel by modifying the default attributes as needed.

Configure service definition catalog items for License and Permit Playbook application

Create a service definition for use with the License and Permit Playbook in Public Sector Digital Services.

Before you begin

Service definitions are records used to store details about a service that is available to end customers. You can create service definitions for each license/permit service offered by your government agency.

Important:

After upgrade to Public Sector Digital Services v8.0, you will now be required to create a Service Definition for every previous Service Offered record. The deprecation of Services Offered means that Service Definitions now must be created for every Service that your agency offers. For more information, see [Services Offered and Services Received Migration Guidance](#) .

Role required: admin

Procedure

1. Navigate to **All > Service Catalog > Catalog Definitions > Maintain Categories > Licenses/Permits**.
2. Select **Permits** or **Licenses**, depending on which category you wish to add a catalog item to.
3. **Optional:** Switch to the Public Sector Digital Services Core application, if prompted.
4. Under the Catalog item related list, select **New**.
5. On the form, fill in the fields.

Public Services Service Catalog form

Field	Description
Name	Name of the public service.

Field	Description
Catalog	Product category that the service falls under. If blank, select Government Service.
Category	Indicates the type of public service. If blank, select either Permits or Licenses , depending on which category you wish to add a catalog item to.
Application	Application scope of the service. If blank, select .
Status	Status of the public service. Mapped in the active field as: - Available = true - Not available = false
Short description	Short description of the public service.
Description	Description of the public service.

6. Select **Submit**.

Your catalog item is created and ready for use by constituents submitting cases through the Government Service Portal, or agents creating a case from scratch in the CSM Configurable Workspace.

Configure E-sign in License and Permit Playbook

E-Signature enables users to sign their applications from Government Service Portal with a typed or drawn e-signature that implies an acknowledgement to the application. This functionality can be optionally configured by an admin upon upgrade.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Service Catalog > Record Producers**.
2. Select the **Request License** record producer.
3. Under the Variables tab, select **New**.
4. Under Type, select **Custom**.
5. In the **Questions** tab, enter **Esignature for Record Producers** in the Question field, and `esignature_for_record_producers` in the Name field.
6. In the **Type Specifications** tab, enter **Esignature for License Permit in Portal** in the Widget field.
7. Select **Submit**.
8. Under the Variables tab, select **New**.
9. Under Type, select **Multi Line Text**.
10. Select the checkbox for **Hidden**.
11. In the **Questions** tab, enter **Esignature Variable** in the Question field, and `esignature_variable` in the Name field.
12. **Optional:** If an eligibility checklist is configured for License and Permit Playbook, navigate to **All > Service Catalog > Catalog Administration > Catalog UI Policies** to create a Catalog UI Policy for the record producer catalog item.
Switch to the Public Sector Digital Services Core application if prompted.

- 13. Optional:** Add a show/hide logic to the script of the record producer for the `esignature_for_record_producers` widget.
- 14.** Append the following code block in the server script of the **Request license** record producer in the **What it will contain** tab.
Switch to the Public Sector Digital Services Core application if prompted.

```
if (gs.nil (producer.esignature_variable) || producer.
    esignature_variable == "") {
gs. addErrorMessage(gs. getMessage ('Please do the E-signature
    and click on Accept. '));
current.setAbortAction(true);
var caseTable = sn_gsm. GovernmentServicesConstants.
    LICENSE_PERMIT_CASE;
var attachment = new GlideSysAttachment();
var caseRecord = new GlideRecord (caseTable);
caseRecord.get (current.sys_id) ;
var fileName = 'applicantESign.png';
var contentType = "image/png";
attachment.writeBase64(caseRecord, fileName, contentType,
    producer.esignature_variable);
var sigRec = new GlideRecord('signature image');
sigRec.signed_on = new GlideDateTime ().getDisplayValue();
sigRec.user = gs.getUserID();
sigRec.table = caseTable;
sigRec.document = current.sys_id;
sigRec.is_drawing = true;
sigRec.active = true;
sigRec.acknowledgment_text = "This constitutes your electronic
    signature and has the same legal impact as signing a printed
    version of this document.";
var signSysId = sigRec.insert();
var signRecord = new GlideRecord('signature image');
signRecord.get (signSysId);
attachment.writeBase64(signRecord, fileName, contentType,
    producer.esignature_variable);
```

15. Select **Update**

Result

The **Draw Signature** tab is now be displayed alongside the **Type Signature** tab. When a constituent creates a License and Permit case, the option to type draw a signature is shown. When an application is submitted with an E-Signature, an image is created containing E-Signature of the user, which is then mapped and attached to the corresponding application.

Configure Eligibility in License and Permit Playbook

The eligibility criteria in License and Permit Playbook allows an agent to confirm whether an applicant is eligible for the specific license or permit requested.

The License and Permit Playbook uses eligibility criteria, a series of questions posed to an applicant, to determine whether they are eligible to apply for a license or permit. Using a set eligibility criteria for License and Permit Playbook may aid in deflecting applications in which the applicant is not eligible to obtain a license or permit.

Eligibility criteria is established by performing the following three activities:

- Creating a checklist template for the license or permit class.
- Adding the eligibility checklist to the license or permit record producer.
- Mapping it to the respective license or permit class.

If the applicant fulfills all the eligibility criteria, then the agent can proceed in creating a case for the applicant. If the applicant does not fulfill at least one of the eligibility criteria, an agent cannot proceed in creating a case for the applicant.

Configure Eligibility Checklist UI in License and Permit Playbook

Configure the eligibility checklist UI as a part of Record Generator in License and Permit Playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Tables**.
2. Select the **Checklist Template** table by clicking on the label link.
3. Select **Show List** under **Related Links**.
4. Select **New**.
5. Create a Checklist Template record by filling in the fields.
6. Select **Submit**.
7. Right-click on the top menu bar of the new Checklist Template record, and in the context menu, select **Copy sys_id**.
8. Navigate to **All > System Extension Points > Scripted Extension Points**.
9. Open the `sn_gsm_lic_prmt.GSMLicensePermitConfig` record, and locate the `getEligibilityChecklist` function.
10. **Optional:** Switch to the License and Permit Playbook application to edit the record, if prompted.
11. Add the logic after the `if` function.
An example logic, placing within the quotes the table name and `sys_id` numbers, respectively.

```
} else if(tableName == "[table name]") {
return "[sys_id]";
```

12. Select **Create implementation**.

Result

The Eligibility Checklist now displays when you create a new License and Permit record in the first License and Permit Playbook activity. See [Define Eligibility Questions in License and Permit Playbook](#) to configure the criteria used to determine eligibility for the License or Permit.

Define Eligibility Questions in License and Permit Playbook

Configure the eligibility criteria questions for users beginning an application for a license or permit.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Service Catalog > Catalog Variables > Variables Sets**.
2. In the Variable Set list view, select **New**.
3. Select **Single-Row Variable Set**.
4. Enter the desired title and internal name and select **Submit**.
5. In the list, locate and open the newly created Variable Set.
6. In the **Variables** related list, select **New** to create a variable for each eligibility question.
7. Select **Yes/No** as the variable type.
8. Repeat steps 6-7 until a variable is created for each eligibility question.
9. Create a variable with the name **Eligible**, and enter **Yes/No** in the Question field.
10. Select **Yes/No** as the variable type.
11. In the **Catalog UI Policies** related list, select **New**.
12. Enter a short description for the policy.
13. Navigate to the **When to Apply** tab.
14. Add a catalog condition to the UI policy for each eligibility question, and set the condition to **is Yes**.
15. Navigate to the **Script** tab, and add the following scripts to the True and False conditions.
16. Select **Submit**.
17. Navigate to **#All > Service Catalog > Catalog Definition > Record Producers**.
18. Locate the License/Permit Record Producer and open the record.
19. Navigate to the **Variable Sets** tab and then select **Edit**.
20. Locate the Variable Set created for the eligibility criteria and move it to the variable sets list by selecting the right arrow button.
21. Select **Save**.

Result

The eligibility criteria questions are now defined and can be used to determine if a constituent is eligible to begin a license or permit application.

Configure decision tables for License and Permit Playbook

Use decisions tables to simplify the pricing configuration of a license or permit request that depends on multiple factors. Decision tables provide a single point where you can create, view, and modify pricing and dependent attributes.

Before you begin

Role required: admin

About this task

In decision tables, each factor is a decision input. For example, if your agency is setting the price of a fishing permit, these inputs might include the location where the permit is being requested, the type of fish (one or multiple) that a fishing permit is being requested for, and the size of the fishing boat. Using a decision table can allow agents to present pricing in a straightforward manner, even when it depends on multiple factors.

Procedure

1. Identify which table fields in the License and Permit record will affect the fee associated with the license or permit request.
For example, each type of fish under the fishing permit record has a different fee associated with it. These are examples of table fields that affect the total fee associated with the permit request.
2. Navigate to **All > System Definition > Decision Tables**.
3. Select **New**.
4. Enter a name for the decision table and ensure the table is accessible from **All Application Scopes**.
5. Select **Create & Continue**.
6. Select **Add** to add an input.
7. Create an input with **Case** as the label, **Reference** as the type, and **License & Permit case extension table** as the table.
8. Select **Add result column** to add the pricing column.
9. Set the column label to **Price**, and set the result type to **Currency**.
10. Select **Done**.
11. Select **Add condition column**.
12. Set the input to **Case**, and set the Data to evaluate to **Field**.
13. Select the drop-down menu under Field, and select the field that is associated with pricing.
14. Select **Done**.
15. Select **Add New Decision Row**.
16. Select the new table cell that was added under the Field label column and ensure the operator reads "is".
If the field type is choice, the input value cannot be "None". Select the appropriate choice input from the dropdown menu. If the field type is true/false, the input value should be **true**.
17. Select the new table cell that was added under the Price column, and enter the price associated with the field value.
If the field type is **choice**, repeat steps 15-17 for each option of the choice.
18. **Optional:** Select the plus icon that appears below Results, and choose **Add Condition Column** to add another pricing field.
Repeat until all pricing fields are added.
19. Select **Save** to save the decision table, then select **Close**.

Result

The decision table is now created and can be associated with the License and Permit case type. For more information on how to do this, see [Associate a decision table with a License & Permit case type](#).

Create a Pre-eligibility Decision Table in License and Permit Playbook

The License and Permit Playbook incorporates the use of pre-eligibility criteria, a series of questions that may be posed to an applicant to determine whether they are eligible to apply for a license/permit. This aims to deflect applications in which the applicant is not eligible to obtain a license/permit.

Before you begin

Role required: admin

About this task

Pre-eligibility criteria is established by performing the following activities:

- Configuring a new pre-eligibility Decision Table.
- Update the Public Sector Digital Services Pre-eligibility Configuration decision table

Procedure

1. To configure a new pre-eligibility Decision Table, Navigate to **All > Workflow Studio**.
2. Select **New**.
3. Select **Decision Table**.
4. On the form, fill in the fields with the following information:

Field	Entry
Decision Table	Drivers License Pre-eligibility
Application	License and Permit Playbook
Accessible from	All Application Scopes
Draft Authoring	Selected

5. Select **Build decision table**.
6. Select **Add an input**.
7. On the form, fill in the fields with the following information:

Field	Entry
Label	applicant_over_age_18
Type	String

8. Repeat steps 6-7 for all pre-eligibility questions that will appear on the first activity of the playbook.
9. Select **Add condition column**.
10. On the form, fill in the fields with the following information:

Field	Entry
Condition Column Label	applicant_over_age_18
Input	applicant_over_age_18
Default Operator	is

11. Select **Done**.
12. Select the field below the newly created condition column, and enter the value **Yes** or **No** depending on the expected response for eligibility.
13. Select the  icon and select **Add condition column**.
14. Repeat steps 10-13 for all input values that determine the eligibility.

15. Select the  icon and select **Add result column**.

16. On the form, fill in the fields with the following information:

Field	Entry
Result Column Label	Eligibility
Result Type	True/False

17. Select **Done**.

18. Update the Eligibility result field to be True if all conditions are met, and select **OK**.

19. Select **Save**.

20. Select **Publish**.

21. Select **Publish**.

The status of your decision table should be set to **Active**.

22. To update the Public Sector Digital Services pre-eligibility configuration decision table, navigate to **All > Workflow Studio**.

23. Select **Decision tables**.

24. Select **Public Sector Digital Services Pre-eligibility Configuration**.

25. Select **Create Draft**.

26. Select the  icon to add a new decision row.

27. On the form, fill in the fields with the following information:

Field	Entry	Description
Table	sn_gsm_drivers_license_case (or the name of the extended L&P Table)	The column name (not the column label) for the associated pre eligibility question that exists on the license and permit case table or extended table.
Product Model	Drivers License	Product model for the particular license/permit.
Description	Confirm the applicant's eligibility by answering the questions below.	The description that displays at the top of the pre-eligibility activity in the playbook.
Form Header		Shows a form header above the eligibility questions.
Error Header	Not eligible	Error header in the first playbook activity that stating that the applicant is not eligible after clicking "Start Application".
Error Message	Each license/permit has certain criteria that must be	Error message in the first playbook activity that stating that the applicant is not

Field	Entry	Description
	met to apply. Review your answers to ensure accuracy.	eligible after clicking "Start Application".
Help URL	Link to a ServiceNow® Page	Presents a Learn more link within the error message if the applicant is found to be ineligible. The value in this field will be a link to a ServiceNow® page.
Eligibility	Drivers License Pre-Eligibility	The eligibility decision table created in the previous section for this particular product model.

28. Select Save.

29. Select Publish.

30. Select Publish.

The status of your decision table should be set to **Active**.

Associate a decision table with a License & Permit case type

After you configure a pricing configuration decision table, associate it with the License & Permit case type to append pricing configurations to that case type table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Decision Tables**.
2. Locate the pricing configuration decision table for the License and Permit case type, and right-click.
3. In the context menu, select **Copy sys_id**.
4. Navigate to **All > System Definition > Dictionary**.
5. Locate the entry with **sn_gsm_license_permit_case** as the Table name, and **attribute_pricing_config** as the Column name.
6. Select the record to open it.
7. Under the Dictionary Overrides tab, select **New**.
8. Set the Table field to the License and Permit case type table that you wish to associate with the decision table.
9. Select the checkbox for **Override default value**.
10. Paste the copied sys_id value into the **Default value** field.
11. Select **Submit**.

Result

The decision table is now associated with the License & Permit case type.

Add a price adjustment to a decision table

As an admin, you can use a price adjustment definition to add adjustments to field prices based on the conditions of fields that are not price fields, such as resident status of the constituent for the location they are requesting the permit or license in.

Before you begin

Role required: admin

About this task

A base amount can be entered and saved for each license/permit option, and can be modified from its current value to a new value based on one or more control conditions. A price adjustment definition consists of only one price field, and as an admin, you can create multiple.

Procedure

1. Navigate to **All > System Definition > Decision Tables**, and open a decision table that has been associated with a License and Permit case type.
For information on how to associate a decision table with the case type, see [Associate a decision table with a License & Permit case type](#).
You should be brought to Workflow Studio.
2. Select **Add condition column**.
3. Set the Input to **case**, and set Data to evaluate to **Field**.
4. Under Field, select the field that controls the pricing for the price adjustment in question.
5. Enter the name of the aforementioned field in the condition column label, and select **Done**.
6. Repeat steps 4-6 for all price control fields.
7. Select **Add new decision row**.
8. Select the newly added cell under any of the price control columns to add control conditions.
9. Specify the control condition for that field.
If the field type is a choice, the input value cannot be "None". Select the appropriate condition from the dropdown.
10. Repeat steps 11-12 to add conditions for other control fields.
11. *If the price field where the adjustment applies is set to choice, enter the price choice affected. If the price field where the adjustment applies is not choice, set the value to true.*
12. Enter the adjustment price in the newly-added cell under the Price column, the price when those control conditions apply.
If the price field is a Boolean, the value of the price field has to be set to **true**. If the price field is a choice, the value of the price field cannot be set to **none**. Enter the value of the adjustment price in the field.
13. Select **Save**, then **Close**.

Append price to Pricing Attribute label

Prices are appended to Boolean Price Attributes by default. Client scripts must be added for the price choice attributes and the price control attributes to append to prices when there are price adjustments.

Add Client Scripts to Price Choice Fields

As an admin, you can add and modify client scripts to configure forms, fields, and field attributes (such as price choice attributes) while the user is filling out the form.

Before you begin

Role required: admin

About this task

Client scripts allow the system to run JavaScript on the client (web browser) when client-based events occur on the Government Service Portal, such as when a constituent makes a choice, submits a form, or changes a value. For more information on client scripts, see [Client scripts](#).

Procedure

1. Navigate to **All > System Definition > Client Scripts**.
2. Select **New**.
3. Specify a name for the script.
For example, if you are adding a script to update the price values each time the permit type is changed by the constituent submitting the application, you may wish to label your script "Update Price Label on Permit Type Change".
4. Set the table to the License/Permit case extension table.
5. Set UI type to **All**, and set the Type to **OnChange**.
6. Select the price choice field under the dropdown for field name.
In the above example, the field name selected would be **Commercial Permit Type**; that is the choice the constituent makes that then determines the price values that are displayed. For more information on the client script form fields, see [Client scripts](#).
7. Enter the script with the content below:

```
function onChange(control, oldValue, newValue, isLoading,
    isTemplate) {
    if (isLoading) {
        return;
    }
    g_scratchpad.updatePriceLabel();
}
```

8. Select **Submit**.

Add Client Scripts to Price Control Fields

As an admin, you can add and modify client scripts to configure forms, fields, and field attributes (such as price control attributes) while the user is filling out the form.

Before you begin

Role required: admin

About this task

Client scripts allow the system to run JavaScript on the client (web browser) when client-based events occur on the Government Service Portal, such as when a constituent makes a choice, submits a form, or changes a value. For more information on client scripts, see [Client scripts](#).

Procedure

1. Navigate to **All > System Definition > Client Scripts**.
2. Select **New**.
3. Specify a name for the script.

For example, if you are adding a script to update the price value based on whether or not the constituent communicates that they are a resident of the requested location, you may wish to label your script "Update Price Label on Resident Change".

4. Set the table to the License/Permit case extension table.
5. Set UI type to **All**, and set the Type to **OnChange**.
6. Select the price control field under the dropdown for field name.
In the above example, the field name selected would be **Resident**; that is the control field then determines the price value that is displayed. For more information on the client script form fields, see [Client scripts](#).
7. Enter the script with the content below:

Note:

Remove `newValue === ''` in the script if the field type is a choice.

```
function onChange(control, oldValue, newValue, isLoading,
    isTemplate) {
    if (isLoading || newValue === '') {
        return;
    }
    g_scratchpad.updatePriceLabel();
}
```

8. Select **Submit**.

Extend the License and Permit Base Case

Licenses and permits are modelled as products, and for approved applications, the license or permit instances will be generated and recorded in the specific install base item extensions, referred to as Items Received. You can further extend the install base to define specific license or permit items received classes.

Before you begin

Role required: admin

Procedure

1. Review the legacy permit application's attributes and pre-determine the attributes to be created on the extended case type.
2. Navigate to **All > System Definition > Tables** and select **New**.
3. Enter the name of the license or permit for which new cases will be created.

Note:

The value in the Name field will be auto-populated based on the value entered in the Label field.

4. Select the License and Permit Case value in the Extends table field.
5. Right-click in the record header and select **Save**.
6. Select **New** under the Columns tab to add additional fields relevant to the license/permit application.
7. Enter a value in the Column label field, and select options for the other column-level attributes.

8. On the form, fill in the fields, adding new columns for each question listed in the license/permit application.
9. Select **Update**.

Create Document Templates for License and Permit Playbook

With the ServiceNow Document Templates application, you can create HTML and PDF document templates to generate standard letters or documents. You can automate and simplify the process of filling, signing, and reviewing a document online. Use the Document Templates application to generate templates for various types of Licenses and Permits issued through the License and Permit Playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Document Templates > All Document Templates**.
2. Select **New**.
3. Select **PDF Document Template**.
4. On the form, fill in the fields:

PDF Template form

Field	Description
Name	Name of the PDF document template.
Table	Determines where the documents are attached. Select License and Permit Case [sn_gsm_license_permit_case] to map the generated PDF to the case. Select License and Permit Install Base Item [sn_gsm_license_permit_install_base_item] to map the generated PDF fields to the Item Received.
Category	Document category in which the template is added. For License and Permit Playbook, select License and Permit.
Application	Scope of the application in which the document template is created.
State	Current state of the document template. ○ Draft: Indicates that the document template is not yet published. ○ Editing: Indicates that the document template is being edited after it has been published. ○ Published: Indicates that the document template can be consumed by services and cases.
User criteria	Audience criteria for this document. For example, you can create a permit intended for only Canadian residents. Note: When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

Field	Description
Start date	Date starting which the PDF document template is valid. Start date helps in maintaining multiple versions of same template. i Note: Start date must be before the end date.
End date	Date until which the PDF document template is valid. End date helps in maintaining multiple versions of same template. By default, if values in Start date and End date are blank, it is implied that the template will always be valid. If you specify an end date, you must also specify a start date.
Template date format	Format in which you want the date to appear when an agent previews the document, or generates the attachment, or initiates document tasks for participants. i Note: - When signing using a ServiceNow application or the AdobeSign application: If no value is selected in Template date format, the value specified in the template_date_format system property is considered. If both Template date format and template_date_format system property are empty, the value in the Date format field from agent's user profile is considered. - When signing using the DocuSign application: The date format selected in Signing settings in the DocuSign application is considered over Template date format in the configured PDF template in a ServiceNow instance.
Template language	Language in which dynamic tokens are translated when an agent previews the document, or generates the attachment, or initiates document tasks for participants. i Note: - Template language is a mandatory field. The default language is none. - Translation feature is available only when the language plug-ins are installed on the instance.
Signing type	Option to specify the application that is used for signing or filling the document. For example, ServiceNow Sign, DocuSign or AdobeSign. i Note: Signing types are available only when respective integration plug-ins are installed.

Field	Description
Attachment type	Option to upload a new document or select a document from ServiceNow Managed Documents.
Document	Option to upload the attachment of a fillable PDF for further customization. Note: This field appears when Upload new document is selected in Attachment type .
Document revision	Option to select a document from ServiceNow Managed Documents. Note: This field appears when Select from document revision is selected in Attachment type .
Active	Option for enabling the PDF document template for use.
Acknowledgment text	Text that prompts the user to select a check box when submitting a filled document.
Source template	Source template from which you created a copy of current template.

5. Optional: Select the **Parse PDF** related link to automatically parse information and fields from the PDF and store that information in the PDF Mapping table for reuse. Each PDF field can now be mapped to its corresponding Mapping Field in the License and Permit install base table.

6. Optional: In the **PDF Template Mappings** related list, define additional PDF field mappings. See [Define a PDF field mapping](#) for more information.

7. Select Update.

To determine what Document Template to use for generation, you must map the created Document Template to the corresponding Install Base Item/Items Received extension table. This is accomplished by using Document Template Mapping in Decision Tables.

8. Navigate to Decision Management > Decision Builder.

9. On the form, fill in the fields.

PDF Template form

Field	Description
Document Template Category	Use this field for having multiple templates for a single Install Base Item Table.
Table Name	Use this field for what table should map to the document template.
Document Template	Use this field to indicate what Document Template to use for a given document template category and table name.

Field	Description
isPdfTemplate	Use this field to indicate whether the Document Template selected is a PDF template (value = true) OR an HTML template (value = false)

10. Add additional decision rows to configure additional Document Templates.

Result

The PDF generated by the Document Template is created after the **Propose decision** activity is granted/approved. You will be able to view the generated PDF that is attached to the corresponding install base item/item received in the **Create License/Permit** activity in the Decision stage.

What to do next

In the **Participants** related list, add additional participants. See [Create participants for a PDF document template](#)  for more information.

Define a Product Model for License and Permit Playbook

A product model record is required in a license/permit case application.

Before you begin

Role required: admin

About this task

For a license/permit case, a product model is used to represent a specific type of license/permit. Having a specific product model can help support multiple aspects of the permitting process implementation, including but not limited to defining the product, tying together services associated to it, delivering specific product instances, additional workflows, reporting, etc.

Additional fields to describe the permit product can be added if required. For example, for a drivers license, one could add a choice field for license class with choices A, B, or C, then create three records, one per class.

If there are multiple types of permits with unrelated fields, you can extend specific product model classes from the permit model base class. For example, if your agency offers bird taxidermy and wildlife import/export permits out of the same organization, consider whether you need specific permit model classes that would help define different attributes on each permit product.

Procedure

1. Navigate to **All > Constituent Service > Products > Permit Models**.
2. Select **New**.
3. Select **Form Header > Configure > Form Layout**.
4. Select **Edit this section in Expanded Model and Asset Classes**.
5. Select the checkbox next to the **Cost** and **Customer Visible** fields.
These fields must be set to true in order for the constituent or businesses contact to determine their pre-eligibility.
6. Fill in the fields.
7. Select **Submit**.

Configuring Playbooks-on-portal for a custom case type

As an admin, you can configure the playbooks-on-portal experience for a custom case type that extends the base License and Permit case.

Before you begin

Role required: admin

Procedure

1. To first duplicate the playbook process, navigate to **All > Process Automation > Workflow Studio**.
2. In the Processes list, select **Licenses/Permits Playbook**.
3. Select the More Actions menu and select **Duplicate**.
4. Fill in the **Label** field with the desired name for the playbook.
5. Select **Duplicate**.
6. Modify the playbook for the particular license use case, then select **Activate**.
7. Navigate to **All > Record Generators**.
8. Select **New**.
9. On the form, fill in the fields with the following:

Field	Entry
Table	License and Permit Case or the extended License and Permit table. This is the table the record generator will trigger for.
Process Definition	Playbook created in the previous section.
Create Record Activity Name	Answer Eligibility Questions (first Playbook activity).
Create Record Form View	LicensePermitRecordGenerator
Template Fields: Product	Drivers License
Template Fields: Service	Driver's license – New Request

10. Select **Submit**.
11. Navigate to **All > Service Definitions**.
12. Select **Drivers License – New Request**.
13. Select the search icon next to the Playbook record generator.
14. Select the pre-created playbook record generator for the extended case type.
15. In a new window, navigate to **All > Playbook Experience > Playbook Content Items**.
16. Select **New**.
17. On the form, fill in the fields with the following information:

Field	Entry
Name	Driver license application
Catalogs	Government Services
Category	Licenses
Short Description	Application for an individual to obtain permission to legally operate a motor vehicle

Field	Entry
	on any road, freeway, or other way accessible to the public.
Table	Select the table License and Permit Case, or the extended table created.
Playbook Experience	CSM Configurable Workspace
Playbook Experience Record Generator	Previously Created Record Generator
Portal Page	GSM Intake
Title	Drivers License Application

18. Select **Submit**.

19. Select the Playbook Content Item that is created.

20. In the **Available For** related list, Select **Edit**.

21. In the Collections dropdown, select **SNC External** and add it to the Available List.

22. Select **Save**.

23. In the **Not Available For** related list, select **Edit**.

24. Select **SNC External** and add it to the collection.

25. Select **Save**.

26. Verify the playbook content item you created displays in the Services list on the Government Service Portal.

Install and configure the Social Benefits Playbook application

Install the Social Benefits Playbook application, which enables public sector end users to submit and track social benefit requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the Social Benefits Playbook, after you install the [Public Sector Digital Services Core](#) application.

Configuration tasks for Social Benefits Playbook

Task	Description
Install Social Benefits Playbook for Public Sector Digital Services	Install Social Benefits Playbook (app-psds-social-benefits) from the ServiceNow® Store.
Automatically route social benefit requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign social benefit requests to designated agents.
Configure Eligibility Rules Engine in Social Benefits Playbook	Configure the eligibility framework engine to allow agents to confirm whether an applicant is eligible for the specific social benefits requested.

Install Social Benefits Playbook for Public Sector Digital Services

You can install the Social Benefits Playbook application (app-psds-social-benefits) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#) .
- Certain features in the Social Benefits Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

Note:

Install the [Playbooks for Customer Service Management](#)  application to enable the playbook experience.

- Review the [Social Benefits Playbook](#)  application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Social Benefits [sn_gsm_social_benefits_case] table is installed with Social Benefits Playbook.

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Social Benefits Playbook application (sn_gsm_soc_bnfts) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Automatically route social benefit requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign social benefits requests to designated agents.

The Social Benefits Playbook application provides the following items that are used in AWA to automatically route and assign social benefits requests:

- **Social Benefits Request service channel** - The default service channel for routing incoming public sector social benefits requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector Social Benefits Request assignment group** - The default assignment group that identifies the agents handling public sector social benefits requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector Social Benefits Requests queue** - The default queue to which public sector social benefits requests are routed.
- **Inbox layouts** - The default card layouts for social benefits request items displayed in the agent inbox view of CSM Configurable Workspace:
 - **Constituent Social Benefits Layout**: Includes **Short description**, **Constituent**, and **Case Type** fields.
 - **Business Social Benefits Layout**: Includes **Short description**, **Business**, **Business Contact**, and **Case Type** fields.

As an admin, you can enable and disable Advanced Work Assignment for Social Benefits Request cases, as well as change the default attributes for the Social Benefits Requests service channel, such as the related assignment group and queue settings. For details, see [Configure Social Benefit Requests service channel](#).

Configure Social Benefit Requests service channel

Change the default Social Benefit Requests service channel attributes in Advanced Work Assignment to control how public sector social benefit requests are routed and assigned to government agents.

Before you begin

- [Activate the Advanced Work Assignment plugin \(com.glide.awa\)](#) .
- [Activate the Agent Chat plugin \(com.glide.interaction.awa\)](#) .
- [Install the Social Benefits Playbook application](#).

Role required: admin, awa_admin

About this task

You can modify the context and attributes for [service channels](#)  in AWA. For the Social Benefit Requests service channel, use the Public Sector Requests assignment group to specify the agents handling social benefit requests. You can also add advanced conditions to filter the routing conditions in the Social Benefit Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Social Benefit Requests service channel by modifying the default attributes as needed.

Configure Eligibility Rules Engine in Social Benefits Playbook

The eligibility criteria in Social Benefits Playbook allows an agent to confirm whether an applicant is eligible for the benefit program being requested.

The Social Benefits Playbook uses an eligibility rules engine, a series of pre-defined policies that are associated to a specific benefit, to determine whether they are eligible to apply for one or more social benefit programs that your agency offers. These policies are a set of pre-defined rules and logic that determines whether a constituent will receive benefits or not. Using a set eligibility rules criteria for Social Benefits Playbook may aid in deflecting applications for which the applicant is not eligible for a specific social benefit program. These policies can be updated as rules and regulations surrounding these social benefit programs change. The policies in Social Benefits Playbook eligibility rules engine criteria are powered by Policy as Code Engine (PaCE).

Eligibility policies are established by:

- Defining, testing, and publishing eligibility policies in the policy management home.
- Mapping published policies to one or more benefit type(s).
- Updating existing policies as laws and regulations change.

You can use the eligibility rules engine to manage the life cycle of a policy and create, update, review, and execute policies. With the eligibility rules engine, you can:

- Evaluate any changes to ensure they meet your organization's policy management requirements.
- Create a policy, modify policy information, or copy a policy and its version to a new policy.
- Create a new policy version by copying an existing policy version and modifying it.
- View and define mapping information for any policy.
- Review executed policy activity and execution history for policies and policy versions.
- Use tags and categories to manage your policies more efficiently.

If the applicant fulfills all the criteria set forth by the eligibility rules engine policies, then the applicant can proceed with their application, or the agent can proceed in creating a case for the applicant. If the applicant does not fulfill at least one of the eligibility criteria, neither an agent nor an applicant can proceed in creating a case for the social benefit program.

Configure Preliminary Verification Checklist UI in Social Benefits Playbook

Configure the preliminary verification checklist to determine if an applicant is eligible to begin an application for one or more social benefits.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Decision Tables**.
2. Select the **Social Benefits Preliminary Verification** table by selecting the label.
3. Under Inputs, enter one or more labels for your desired verification questions, and select **String** as Type.
4. Add the necessary filter conditions using the condition builder.
These conditions determine the outcome of the policy.

5. Add a condition column for each input above by selecting the **Add** icon.
6. Use the dropdown to set what combination of answers will yield an approval or denial.

Result

The questions are shown on the first page of the Government Service Portal intake page.

Define Eligibility Questions in Social Benefits Playbook

Configure the eligibility criteria questions for users beginning an application for social benefits.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Service Catalog > Catalog Variables > Variables Sets**.
2. In the Variable Set list view, select **New**.
3. Select **Single-Row Variable Set**.
4. Enter the desired title and internal name and select **Submit**.
5. In the list, locate and open the newly created Variable Set.
6. In the **Variables** related list, select **New** to create a variable for each eligibility question.
7. Select **Yes/No** as the variable type.
8. Repeat steps 6-7 until a variable is created for each eligibility question.
9. Create a variable with the name **Eligible**, and enter **Yes/No** in the Question field.
10. Select **Yes/No** as the variable type.
11. In the **Catalog UI Policies** related list, select **New**.
12. Enter a short description for the policy.
13. Navigate to the **When to Apply** tab.
14. Add a catalog condition to the UI policy for each eligibility question, and set the condition to **is Yes**.
15. Navigate to the **Script** tab, and add the following scripts to the True and False conditions.
16. Select **Submit**.
17. Navigate to **#All > Service Catalog > Catalog Definition > Record Producers**.
18. Locate the License/Permit Record Producer and open the record.
19. Navigate to the **Variable Sets** tab and then select **Edit**.
20. Locate the Variable Set created for the eligibility criteria and move it to the variable sets list by selecting the right arrow button.
21. Select **Save**.

Result

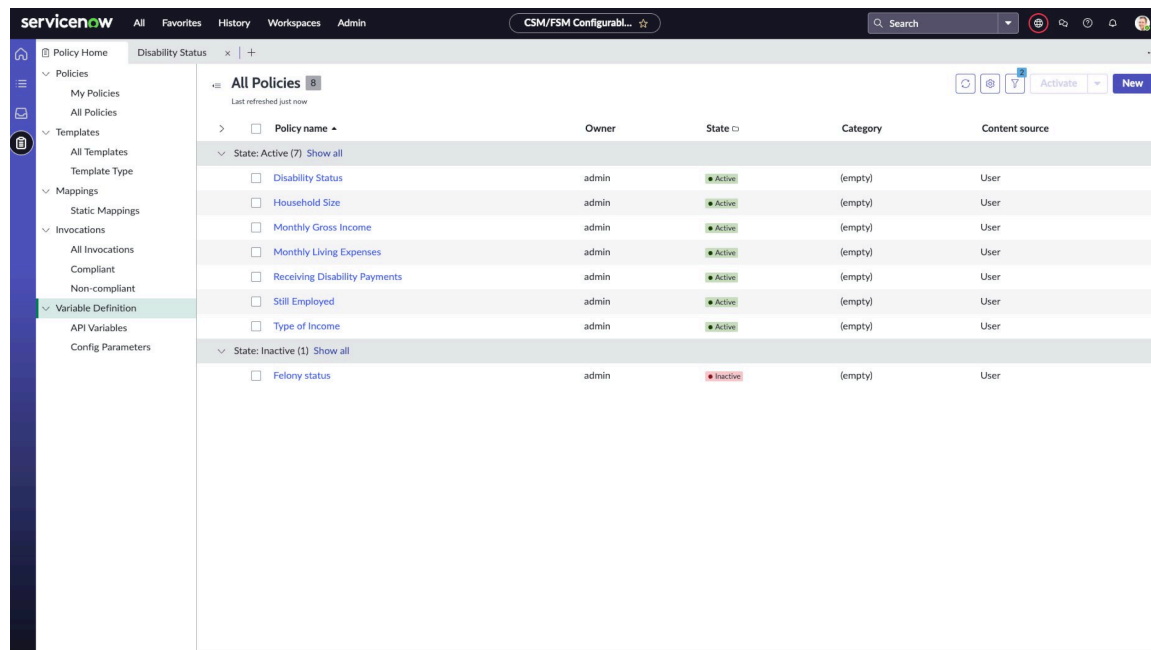
The eligibility criteria questions are now defined and can be used to determine if a constituent is eligible to begin a social benefits application.

Configure Eligibility Rules Engine Policies in Social Benefits Playbook

Use the Social Benefits Playbook Eligibility Rules Engine, powered by Policy as Code Engine (PaCE), to manage the life cycle of a policy and create, update, review, and execute policies. In the Policy Home of the CSM Configurable Workspace, you can create, remove, and update

the policies used for determining eligibility for an application routed through the Social Benefits Playbook.

You can define and manage your eligibility rules engine policies in a single management console, the Policy Management Home in CSM Configurable Workspace.



Here, you can:

- Create policies.
- Review existing policies.
- Assess and implement changes to each policy.
- Determine if a policy should be used as the template for another policy.
- Understand why a policy may not be working as expected.

You can create any number of policies, which can be updated as required.

Create an eligibility policy using Social Benefits Playbook Eligibility Framework

Create an eligibility policy using Social Benefits Playbook Eligibility Framework.

About this task

You can create a policy from scratch using Policy Management, and define the logic for that policy using the Policy Builder tool. Policy logic is a set of conditions that is used for determining whether or not an applicant is eligible for one or more of the social benefit programs offered by your agency. You can set conditions for the policy using the condition fields.

Before you begin

Role required: admin

Procedure

1. From the CSM Configurable Workspace sidebar, navigate to the **Policy Home**.
2. Select **All Policies** > **New**.
3. Select **New blank policy** to start from a blank policy, or select from the existing policy templates.

4. Select **Create**.

5. On the **Create New Policy** form, fill in the fields.

Create New Policy form

Field	Description
Policy name	The policy name. Note: The policy name must be unique, and is used as the identifier of the policy.
Category	Enables you to group and manage policies more efficiently.
Created	Date and time when the policy was created. Auto-populated.
Updated	Date and time when the policy was updated. Auto-populated.
Description	Additional details for this policy.

6. Select **Save**.

The newly created policy contains the following tabs:

Tab name	Description
Details	Displays the details of the policy, including policy name, category, date created, and a description.
Policy builder	When you create a policy, a draft policy version is created, and must be published before it is current and can be used. Each policy version contains version metadata, a policy script, and variable input definitions, all of which can be modified. Under the Policy builder tab, you can: - Edit a policy version. Note: Published policies cannot be edited. To edit a published policy, select Create a copy . - View version details - Create a new version - Switch from low-code to the code editor - Save the policy as a template - Compare versions - Duplicate policy versions

Tab name	Description
	For more details, see Manage PaCE policy versions  . Note: You must publish a policy version to make it current before it can be used.
Version management	Displays previous versions of the policy. You can also create a new version of the policy.
Mappings	Enables you to define the benefit model to which the policy is to be mapped.
Executions	Enables you to review the execution activity for the policy.

7. Set conditions for the policy using the condition fields.

8. **Optional:** Add a condition set by selecting **New condition set**.

If and else if statement fields

Field	Description
Condition description	Description of the field.
Source	Variable you want to source for the condition.
Operator	List of operators to filter the source for the condition. The list changes depending on the source selected.
Value	Value to enter text. Select the Data picker icon to concatenate multiple text strings with multiple data pills to select a variable for the log. Note: If your Source is choice, you will be unable to select multiple data pills.

9. **Optional:** Add a dependent condition by selecting **or** or **and** next to the condition.

Then and else statement fields

Field	Description
Decision	Decision to determine if the policy is Compliant or Non-compliant .
Log level	Level of the log.
Log message	Log message field to enter text or select the Data picker icon to concatenate multiple text strings with multiple data pills to select a variable for the log.

Field	Description
Output type	Output type of the log. You can select the plus icon to add multiple output types or the minus icon to delete the output type.
Data	Data field to enter text. Select the Data picker icon to concatenate multiple text strings with multiple data pills to select a variable for the log.

10. Select **Publish**.

Result

An eligibility policy is now created, and is ready to be mapped to one of more benefits models of the Social Benefits Playbook. See [Map an eligibility policy to a benefit model](#) for information on how to map the published policy to a specific benefit.

Map an eligibility policy to a benefit model

For a eligibility policy to be invoked correctly, it must be mapped to an existing benefit model. Map a published eligibility policy to one or more of the social benefit types that your agency offers.

Before you begin

Role required: admin

Procedure

1. From the CSM Configurable Workspace sidebar, navigate to the **Policy Home**.
2. Select **Mappings > Static Mappings > New**.
3. Select the social benefit model that you wish to map to from the dropdown.
Objects available for mapping are displayed.
4. Select the policy that you wish to map the social benefit model to.

Result

The newly created mapping is valid and active, and the mapping input is added to the list of policy mappings.

Update an eligibility policy in the Social Benefits Eligibility Framework Engine

Update an eligibility policy in the Social Benefits Eligibility Framework Engine.

Before you begin

Role required: admin

Procedure

1. From the CSM Configurable Workspace sidebar, navigate to the **Policy Home**.
2. Select **All Policies**, and select the policy name.
3. Do one of the following, depending on what information you want to update.

Update a policy logic in the Social Benefits Eligibility Framework Engine

Make changes to the policy logic in the Social Benefits Eligibility Framework Engine. The Policy Builder tab allows an admin to test new logic parameters through the test playground.

Before you begin

Role required: admin

Procedure

1. From the CSM Configurable Workspace sidebar, navigate to the **Policy Home** and select **All Policies**.
2. Select the policy name, and select the **Policy Builder** tab.
3. Select **Create a copy** to create a new version of the existing policy that can be updated accordingly.
A new draft is created that changes can be appended to.
4. Update the value or condition you wish to change, or add a new piece of logic to the eligibility policy.
5. Select the Test Playground icon  in the contextual side panel to test the policy.
6. Select the parameters of the policy logic and select **Run Test**.
7. Review the Output log to ensure there are no issues or errors introduced by the new parameters.
8. Select **Publish**.
9. Select **Publish** again, if prompted.
The previous version of the policy is archived, and the newly published version is made the current production version.

Update policy mapping in the Social Benefits Eligibility Framework Engine

You can edit the mapping settings that map a policy to a benefit model.

Before you begin

Role required: admin

Procedure

1. From the CSM Configurable Workspace sidebar, navigate to the **Policy Home** and select **All Policies**.
2. Select the policy name for the policy that you want to update, and select the **Mappings** tab.
3. Select the Mapping ID in the Input field.
4. In the displayed mapping input form, edit the desired details, and select **Save**.
5. **Optional:** Select **Add** to add a new benefit model to the list of mappings for the policy.

Create an eligibility policy template

Create eligibility policy templates for the Social Benefits Playbook policy forms that you use frequently.

Before you begin

Role required: admin

Procedure

1. From the CSM Configurable Workspace sidebar, navigate to the **Policy Home**.
2. Navigate to **Templates > All Templates**.
3. Select **New**.

4. In the Create New Template form, fill in the fields.

Create New Template form

Field	Description
Name	Name of the policy template.
Template type	Template type organized by category. Template types enable you to select a category, if you have multiple types of policy templates. You can create a template type by following these steps: - Navigate to Templates > Template Type. - Select New. - Fill in the Name and Description field. - Select Save. The type can be selected from the Template type field.
Description	Additional details for this template.
Is low code	Select this check box if the policy template will be written in low-code. Note: You can switch to the code editor from low-code when you create the conditions, but you'll be unable to switch back to low-code.
Updated	Date and time when the policy template was updated.
Updated by	User who updated the policy template.
Created	Date and time when the policy template was created.

5. Select **Save**.

New templates are inactive by default. Select the inactive filter box on the new policy page to view the inactive template.

6. Select the **Template Builder** tab and fill in the conditions in the Policy logic section, then select **Save**.

For more information about the parameters and condition fields, see [Passing parameters to PaCE policies](#) and [Policy logic condition fields](#).

What to do next

Before you activate your template, you can create a policy to test the template.

1. Navigate to **Policies > My Policies**.
2. Select **New**.
3. Select **Preview** to verify the information is correct.
4. Select **Save**.

5. Select the template that you wish to create a policy with, then select **Create**.
6. Fill in the fields, then select **Save**.
7. Select the new draft of the policy and select the **Test Playground** tab to test the policy.
8. Navigate back to **Templates > All Templates**. Select the template that you tested, then **Activate**.

Note:

Updating a template won't affect policies created previously with that template.

Configure automatic cancellation for draft cases in Social Benefits Playbook

An admin can configure auto-cancellation of Social Benefits Playbook cases that remain in the draft state for longer than a set period of time. The number of days that the case can remain in the draft state before it is canceled can be configured by an admin. The default value is five days.

About this task

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System UI > Script Includes** and search for the `SocialBenefitsConstants` record.
2. Select the record to open it.
3. **Optional:** Switch to the Social Benefits Playbook application to edit the record, if prompted.
4. Locate the `SocialBenefitsConstants.SOCIAL_BENEFITS_MODELS_ARRAY = [ function` in the script.
5. Open a separate tab in your instance.
6. In the navigation bar, enter `cmdb_model.list` to display a list of all product models in Public Sector Digital Services playbooks.
7. Right-click on the name of the desired product model record in the Social Benefits Playbook, and in the context menu, select **Copy sys_id**.
For example, to close all draft applications submitted for Unemployment Insurance, right click the Unemployment Insurance record and copy the `sys_id`.
8. Paste the copied `sys_id(s)` into the `SocialBenefitsConstants.SOCIAL_BENEFITS_MODELS_ARRAY = [ function`, adding more as needed.
9. Right click on the top menu bar, and in the context menu, select **Save**.
10. **Optional:** Navigate to **All > System Properties > All** and search for the `sn_gsm_soc_bnfts.sb_cancel_draft_state` record.
11. **Optional:** Switch to the Social Benefits Playbook application to edit the record, if prompted.
12. **Optional:** Change the number in the **Value** field to set the number of days that a case can remain in the draft state before cancellation, and select **Update**.

Result

The Social Benefits Playbook is now configured to auto-cancel any draft cases that have remained in the draft state for more than X number of days.

Relabel items for public sector use after upgrade

After you upgrade your instance for the first time, you can relabel certain items in the CSM Configurable Workspace for public sector use.

Before you begin

Role required: admin

About this task

Certain menus and menu items in the CSM Configurable Workspace are relabeled for public sector use. However, after upgrading your instance, those items revert to the original labels used for Customer Service Management (CSM). You can relabel the following items for public sector use by changing them in the UX List Categories for Customer and Service Organizations.

Label changes in CSM Configurable Workspace for public sector

CSM label	Change to public sector label
Accounts	Businesses
Consumers	Constituents
Internal Business Location	Internal Agency
External Business Locations	External Agency
Service Organization External Staff	External Staff

Procedure

1. Navigate to **All > System Definition > Tables**.
2. In the Tables context menu, select **Label** and in the **Search** box enter `*UX list` to search for lists, then select the UX List Category record.
3. In the UX List Category record, scroll down to the Related Links section and select **Show List**.
 - a. In UX List Categories, select the **Customer** record.
 - b. In the UX List Category for Customer form, go to the UX Lists section and select the **Consumers** record.
 - c. In the **Title** field of the UX List Category for Consumers form, change `Consumers` to `Constituents` and select **Update**.
4. In UX List Categories, select the **Accounts** record.
 - a. In the **Title** field of the UX List Accounts form, change `Accounts` to `Businesses`.
 - b. Select **Update**.
5. In UX List Categories, select the **Service Organizations** record.
 - a. In the **Title** field of the UX List Service Organizations form, change `Service Organizations` to `Agency`.
 - b. Select **Update**.
6. In the UX List Category Agency form, go to the UX Lists section and do the following:
 - a. Select the **Internal Business Location** record.
 - b. In the **Title** field of the UX List Internal Business Location form, change `Internal Business Location` to `Internal Agency`.

- c. Select **Update**.
- d. Return to the UX Lists section, and repeat steps a through c for the **External Business Location** record.
In the **Title** field, change External Business Location to External Agency.
- e. Return to the UX Lists section and repeat steps a through c for the **Service Organization External Staff** record.
In the **Title** field, change Service Organization External Staff to External Staff.

Relabel Business Service Location portal items for public sector use after upgrade

Using Guided Setup, you can optionally modify the "Business Location Details" page in the Business Location Services Portal to be relabeled "Agency Location Details" using Public Sector Digital Services terms during configuration.

Before you begin

Role required: admin

About this task

This script will relabel the "Business Location Details" page within the Business Location Services Portal to "Agency Details". References to "Business Locations" will be changed to "Agencies." The "Install Base" section of the page will be changed to "Items Received." The "Products" section will be removed; there is no equivalent use case of this in Public Sector Digital Services.

Procedure

1. Navigate to **All > Constituent Service > Administration > Guided Setup**.
2. Select **Get Started** to begin configuration.

Public Sector Digital Services Guided Setup Page

0% Complete

Welcome to Public Sector Digital Services Guided Setup

Filter Show all

Government Service Portal Skip

0% Status: Not Started Get Started

0 / 2 Tasks completed

- Customize the Government Service Portal
- Customize the Business Location Services Portal

Configurable Workspace for Public Sector Digital Services Skip

0% Status: Not Started Get Started

0 / 4 Tasks completed

- Configure List Menu
- Configure Landing Page with UI Builder
- Activate Customer Central
- Customize Workspace Labels Manually

Case Types Skip

0% Status: Not Started Get Started

0 / 1 Tasks completed

- Case Types Guided Setup

Guided Setup Skip

0% Status: Not Started Get Started

0 / 1 Tasks completed

- Customer Service Management Guided Setup

The setup page displays the different categories of configuration tasks to be completed.

3. Select **Get Started** under the Government Service Portal category.
4. Select **Customize the Business Location Services Portal**.
5. Follow the steps to complete the Guided Setup task.

Associate an agency location to a Public Service

Associate your government service agency locations with a service definition using the Public Sector Digital Services (PSDS) application. With this association, your government service agency staff can address constituent requests for documents, records, or services that are offered at a particular agency location, and can raise a case on behalf of a constituent or business.

Before you begin

Role required: admin

About this task

An agency location can have multiple public services associated with it. This can include 311 service or maintenance requests, federal or state public records requests, or requests for license and permit services. For example, a specific agency location can offer an application for food stamps or medical assistance, but not an application for a CDL license or a commercial fishing license. A public service-to-agency-location criteria association can be added to each existing service definition in the Service Organizations offering Service [service_organizations_offering_service] table.

Procedure

1. Navigate to **All > Customer Service > Administration > Service Definition**.
2. Select a service definition by selecting the number.
3. In the Service Organizations offering Service related list, select **New**.
4. On the form, fill in the fields.

Agency Locations offering Public Service form

Field	Data type	Description
Service Organizations/ Agency Location criteria	Reference	Criteria to define the agency locations that provide the service.
Service definition	Reference	Service that this specific agency location provides. Note: The Service definition field is automatically filled in with the name of the selected service definition.
Active	True/False	Check box to activate or deactivate the agency location criteria. By default, the active field is set to True . Note: Only one active criterion is enabled per table to be associated to a service definition.

5. Select **Submit**.

The agency locations criteria are added to the Agency Locations offering Public Service related list.

Service definitions for Public Sector Digital Services

Service definitions are records used to store the details about a service provided to end users. By using a service definition, you can connect a public service with a case type to extend the types of services that can be requested, and the types of cases that can be created to support those services.

You can also configure the support types for those services.

Overview of a service definition

In addition to case types, you can use a service definition to create a customized process for connecting a requester with the service needed to resolve their claim. A service definition enables you to map a public service, information service, or license and permit service to the list of services your agency offers for resolving that request. When you create a service definition, you can configure the case management processes, such as the case types, for executing those services.

Service definitions enable you to do the following tasks:

- Configure the support types for services so that applicable services are displayed based on the service requested by the constituent or business.
- Create the case types that support the requested services.
- Automatically select a case type that is based on the service or information type that a constituent or business is requesting.

With a service definition, you establish connections between the public services that are requested and those that are offered. By associating the relevant public services that are offered for the services requested, you can use a service definition to simplify the service requests that are based on the constituent's context.

Service definitions are available with the Customer Service Case Types plugin (com.snc.csm_case_types) that is automatically activated when you enable the Public Sector Digital Services Core plugin.

Important:

After upgrade to Public Sector Digital Services v8.0, Services Offered, an extension of Product Model, will no longer be used to model government services. Services Received, an extension of Sold Product, will no longer be used to model the government services that have been granted/delivered to constituents. The Service Definition table will be used to model all public services offered by governments. The following fields from the Service Offered table will be removed and replaced with Service Model fields:

- Type
- Status
- Number
- Period Start Date
- Period End Date
- Jurisdiction
- Category
- Subcategory
- Payment source

For more information on how to create a service definition, see [Configure a service definition for Playbooks in Public Sector Digital Services](#).

Service definition tasks for administrators

The following main components are needed to create a service definition:

- Service definition record that you create for the new service.
- New view and view rule that you create for the new service on the case type table.

- New flow that you create for the new service. This flow is triggered when a new record is created on the case type table. Flows are only needed for more complex use cases, such as the cases that have multiple tasks or subtasks.
- New record producer for an end-user requester to create through the service catalog.

You can do the following tasks:

- Define the available services.
 - Define the details for each public service that is offered.
 - Associate a playbook with a service.
 - Associate a service catalog item with a service definition so that constituents or businesses can request this service directly.
- Associate the relevant public services that are offered with each request.
- Associate different services with different case types (This task automates the case type selection for the agents by the service that they select).

Defining the processes and data for a Public Service case

You can use a public service case, which is based on the Government Service case type, to extend the customer service case from the Customer Service Management application. By using a case type, you can define the processes and data that are needed to resolve your public service requests.

Overview of a case type

A case type represents the data and the processes that are needed to resolve a specific type of constituent or business request. In addition to using service definitions, you can use the case types feature to create and configure the different types of government service cases that your agency handles. For more information on service definitions, see [Service definitions for Public Sector Digital Services](#).

The base Government Service case type is called a public service case, and is an extension of the Customer Service case type from the Customer Service Management application. The Public Sector Digital Services application also has a Service Request case type, an Information Request case type, and a License and Permit case type, which are all extensions of the base Government Service case type.

As an administrator, you can extend this base case type to create additional case types for various government services that your agency offers.

Creating a case type involves creating a table that is an extension of an existing case, or creating an entirely new case type table. Typically, you must also create roles, modules, workspaces, and other required entities for the case type.

You can use both case types and service definitions to define the data and processes that are needed to resolve a government service request. For more information on service definitions in Public Sector Digital Services, see [Service definitions for Public Sector Digital Services](#).

Case type tasks for administrators

You can configure a case type by creating a table for the new case type that extends the government service base case table. Then, you can set up a series of processes and components for that case type.

- To get an overview of this process, see [Government Service Case Types Guided Setup](#).
- For more details on how to configure case types using Guided Setup, see [Configuring customer service case types](#).

An agent can then use this custom case type to create a case to resolve a constituent or business request. .

Government Service Case Types plugin

The Customer Service Case Types plugin (com.snc.csm_case_types) is activated when you enable the Public Sector Digital Services Core plugin (sn_gsm).

Activating this plugin adds the Case Types module to the application navigator. You can use this module to create and manage case types, as well as extend the Government Service base case type.

For more information on the plugins that are installed with the Public Sector Digital Services Core application, see [Components installed with Public Sector Digital Services Core](#).

Case Types Guided Setup

Activating the Customer Service Case Types plugin adds the Case Types section to the Public Sector Digital Services Core Guided Setup.

Navigate to **All > Constituent Service > Administration > Guided Setup** and use the tasks in this section to create and configure a case type.

You can configure several different processes and components for a Government Service case type by using guided setup, including the roles, access control lists (ACLs), notifications, actions, and record producers.

To create and configure a case type, do the following tasks.

- Create a table for the new case type that extends the base Case table (sn_gsm_government_service_case).
- Configure the UI actions, UI policies, and client scripts for the new case type.
- Configure the views and view rules, roles and access controls (ACLs), business rules, and more for the new case type.
- Set up the processes for the case type, including the record producers, state flows, and special handling notes.
- Create a case type definition record for the new case type and add it to the Case Type table (sn_case_type).
- Configure the Get Case Types flow and modify the conditions that determine the visibility for a case type.

For more information on using Guided Setup for Public Sector Digital Services, see [Configure Public Sector Digital Services Core using guided setup](#).

Government Service case type applications

The following table lists the applications available from the ServiceNow Store that use the Government Service case type and its extensions.

Government Service case type applications

Application	Description
Social Benefits Playbook (app-psds-social-benefits)	Provides an end-to-end workflow for handling applications for one or more social benefit programs submitted by public sector end users.
License and Permit Playbook (sn_gsm_license_permit)	Playbook that provides step-by-step guidance through the life cycle of license or permit request case. This playbook uses the license and permit request case type to capture the details of a request for new license.
Information Request Playbook (sn_gsm_info_req)	Playbook that provides step-by-step guidance through the life cycle of an information request case. This playbook uses the information request case type to capture the details of a requests for various types of federal, state, and local public records that fall outside of nine exemptions.
Service Request Playbook (sn_gsm_srvc_req)	Playbook that provides step-by-step guidance through the life cycle of a service request case. This playbook uses the service request case type to capture the details of the requests for the various types of community maintenance. For more information, see Life cycle of a Public Service case . The Service Request case table [sn_gsm_service_request_case] is installed with Service Request Playbook.

Review the [Service Request Playbook](#), [Information Request Playbook](#), [License and Permit Playbook](#), or [Social Benefits playbook](#) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Public Service case stages

The government service case type moves through the stages that are listed in the following table.

Public service request case stages

Stage	Description
Intake	Default stage for a new case.
Review	Stage when the state is updated from Draft to Open because the case is assigned and has been accepted by the agent named in the Assigned to field.
Process	Stage when the state is updated from Open to Work In Progress.
Decision	Stage when the state is updated from Work In Progress to Resolved.

Public Service Case states

The government case type moves through the states that are listed in the following table. For more information, see [Life cycle of a Public Service case](#).

Public service request case states

State	Description
Draft	Default state for a new case.
New	Case that moves from Draft to New when the user selects Submit .
Open	Case that moves from New to Open when it's assigned and has been accepted by the agent in the Assigned to field.
Work in Progress	Case that moves from Open to Work in Progress when the agent selects Start Work .
Awaiting Info	Case that moves from Work in Progress to Awaiting Info when the agent selects Request Info .
Resolved	Case that moves to the Resolved state when the agent selects Propose Solution .
Closed	Case that moves to the Closed state when the requester selects Accept Solution or Close Case .
Cancelled	Case that is moved to the Cancelled state. This can happen through automatic timeout, or if the requester selects Cancel .

Properties installed with Public Sector Digital Services

Use the system properties that are added with the activation of the Public Sector Digital Services application to configure access control to application data.

These properties are available for Public Sector Digital Services.

i Note:

All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties installed with Public Sector Digital Services

Property	Description
glide.enforce_security_scope.sn_gsm_info_req	Controls access to playbook data for the Information Request Playbook feature. If this property is set to false, then ACLs from all scopes are considered when granting access to playbook data in the scope master table. This would expose information request playbook data.

Properties installed with Public Sector Digital Services (continued)

Property	Description
	• Type: Boolean • Default value: true • Location: System Property [/sys_properties_list.do] table
glide.enforce_security_scope.sn_gsm	Controls how the application data from the Public Sector Digital Services application is accessed. If this property is set to false, access to the application data within the global tables of the Public Sector Digital Services app may be accessible based on the access control lists (ACLs) of those global tables. If this property is set to true, access to data residing in global tables are only evaluated based off the ACLs shipped directly in the Public Sector Digital Services app. Setting this property to false may lead to information disclosure from over permissive ACLs. • Type: boolean • Default value: true • Location: System Property [/sys_properties_list.do] table
glide.enforce_security_scope.sn_gsm_lic_prmt	Determines if only the access control lists (ACLs) within the License and Permit plugin will be used in determining access to the scope, or if ACLs from all scopes will be considered. If this property is set to true, the License and Permit Playbooks data is secured in scope master tables by considering only ACLs from sn_gsm_lic_prmt scope for granting access. If this property is set to false, the License and Permit Playbooks data is exposed in scope master tables by considering the ACLs from all scopes for granting access. For example, the IT Administrator can access License and Permit Playbooks data when this property is set to false.

Properties installed with Public Sector Digital Services (continued)

Property	Description
	• Type: boolean • Default value: true • Location: System Property [/sys_properties_list.do] table

Integrating Public Sector Digital Services with other applications

Extend the capabilities of Public Sector Digital Services and connect with other departments to assist with case resolution by integrating with other applications.

Public Sector Digital Services provides integrations with the following applications:

Field Service Management

Integrating the Public Sector Digital Services application with the Field Service Management application enables you to create and view all work orders and appointments related to your case, depending on the business needs.

Integration with Field Service Management

The Public Sector Digital Services integration with the ServiceNow® Field Service Management application enables you to view work order and work order task information from a public sector case.

Integrating the Public Sector Digital Services application with the Field Service Management application enables you to create and view all work orders and appointments related to your case, depending on the business needs.

The Field Service Management application users can view the constituent, household, business, and contacts on work orders and work order tasks in the Field Service Management application.

Product use rights included with this application

If you've purchased a subscription for both the Public Sector Digital Services (PSDS) application and the Field Service Management (FSM) application, PSDS agents can create and view all work orders and appointments related to their cases.

FSM field agents can view relevant PSDS data from work orders with the right roles.

External users with the snc_external and other relevant PSDS and Customer Service Management (CSM) roles can view all case-related work orders and appointments related to their accounts.

Configuring the integration with Field Service Management

To configure the Public Sector Digital Services application integration with the Field Service Management application, complete these steps:

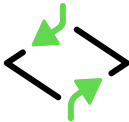
1. Activate the Customer Service with Field Service Management plugin. (com.snc.csm_fsm_integration).
2. Add UI actions to the PSDS case type tables where needed. Depending on your experience, you can also add some actions to relevant playbooks.
3. Add the Work orders related list to the PSDS case type tables for all relevant views on Classic UI and or Workspace.
4. If you're an FSM field agent, you can view the relevant PSDS customer data from the work orders by being assigned with the right customer data viewer roles.

Note:

An administrator must assign the appropriate PSDS customer data viewer roles to FSM field agents so that they can view the relevant PSDS customer data from work orders. For more information on roles, see [Roles installed with Public Sector Digital Services Core](#).

Using Public Sector Digital Services

Learn how public sector agencies help constituents and businesses with digital services and resolve their issues.

Government Service Portal  Report issues, request public records, search for information, and seek assistance from a government service agent— all within a customizable interface.	Playbooks  Guide government agents through the lifecycle of a license and permit, government record, public information, or non-emergency service request case.	CSM Configurable Workspace  Set up CSM Configurable Workspace and expand the Workspace UI to optimize agent government service processes.
Agency Location Service Portal  A one-stop shop to manage internal and external agency locations.	Virtual Agent  Use Virtual Agent to create chatbot conversations tailored to public sector use cases.	Mobile Agent  Enable the development of public sector applications for the delivery of digital services to constituents, such as benefits, licenses, and service requests.

	Now Assist  Use Now Assist for PSDS to enhance user productivity and efficiency through proactive experiences using generative AI.	
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Using the Government Service Portal in Public Sector Digital Services

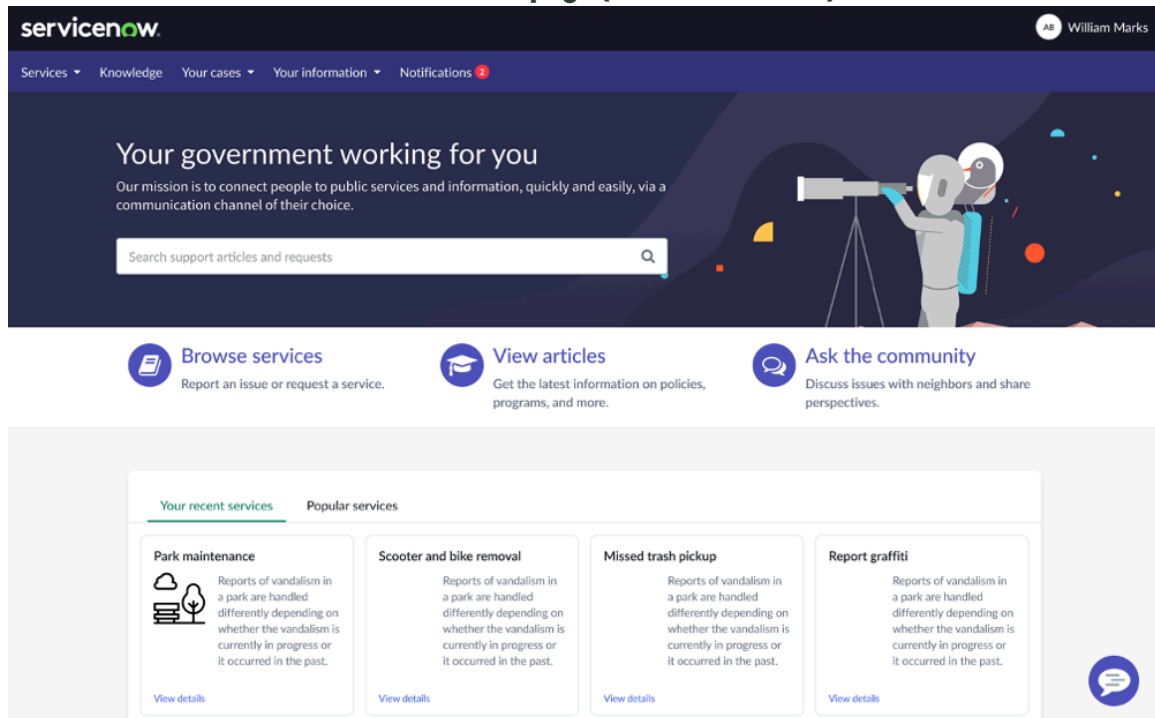
By using the Government Service Portal, constituents and businesses can report issues, access and view the status of existing service requests, request public records, search for information about a question or issue, view and update their contact information, and request assistance from a government service agent— all within a customizable interface.

Using the Government Service Portal as a constituent

The Government Service Portal experience begins on the portal homepage for constituents. Agencies usually customize their homepages to be viewed by registered users, and users who aren't registered. For example, registered users may see different information on the homepage than the users who aren't logged in.

This example shows an example default homepage for a registered user of the Public Sector Digital Services Government Service Portal.

Government Service Portal default homepage (Constituent view)



Constituents on the Government Service default homepage can select the following communication options:

1. Browse and request services or information, track cases, view received services, and report issues.
2. Get the latest information on policies and programs by searching and viewing articles.
3. Discuss issues with neighbors and share perspectives by asking the community.
4. View your recent services and see the popular services on the site.

Note:

Administrators can customize Government Service Portal homepages in Service Portal, so homepages may differ visually across government agencies. For more information on customization, see [Customize the Government Service Portal](#).

The following table lists what constituents can access through the homepage.

Government Service Portal homepage for registered constituents

UI component	Description
Knowledge	Tab where constituents can access the Knowledge homepage and search or view a list of the top-rated or most viewed knowledge base articles.
Services	Tab where constituents can find all the available services in the catalog. They can search through the service catalog or view a list of the recently used or most popular catalog items.
Your Cases	Tab where constituents can find all their cases.
Your Information	Tab where constituents can access quick links to their personal information:

Government Service Portal homepage for registered constituents (continued)

UI component	Description
	• Businesses (agent experience only) • Contacts (agent experience only) • Publications
Notifications	Tab where constituents can see their notifications for resolved cases, cases awaiting information, publications, and approvals.
Tours	Link where constituents can view a tour for additional guidance on how the Public Sector Digital Services application works. An administrator determines whether tours appear on pages.
Live Chat	Link where constituents can chat with a virtual agent or a customer service agent. For more information on using Virtual Agent to get help, see Get help with Public Service requests using Virtual Agent .
Engagement Messenger	Link where constituents can use Engagement Messenger to submit service requests from a third-party web application that is outside of the ServiceNow environment. For more information, see Configure Engagement Messenger for Playbooks .
Profile menu	Link where constituents can access a profile photo to either view a profile or log out.
Search	Link where constituents can search the portal by either entering a keyword to use the type-ahead search or enter one or more words to view all search results.
Most viewed articles	Link where constituents can view a list of the most viewed articles.
Featured articles	Link where constituents can view featured community content.
Most useful articles	Link where constituents can view the most useful knowledge articles by the usage count of the articles.

Unregistered constituents can do the following tasks in the Government Service Portal:

- Register as a new user, create a login, and create a user profile.
- Search for information, browse knowledge articles, and engage with the community.
- Get help using Virtual Agent.
- Request services such as street repair, trash removal, building inspections, and other public maintenance.
- Request information and public records from local, state, and federal public agencies.

After registering and logging in to the Government Service Portal, constituents can:

- View the services that they received.
- View information records that they requested.
- View all license or permit requests.
- View constituent profiles (includes household information, such as names, addresses, and other constituent information).

- View existing cases.
- View publications and notifications including government pamphlets and newsletters about services as well as government notifications.

For more information on the services that are offered in the Government Service Portal service catalog, see [Government Service Portal service catalog list](#).

Using the Government Service Portal as a business

The Government Service Portal enables businesses to access their cases and service information as well as report issues. Business or business contacts can use the Government Service Portal to view their submitted cases, and raise requests by using the service request catalog.

Business contacts have the same functionality as a constituent user, with a few additional permissions. In addition to the constituent user tasks, business contacts can do the following tasks in the Government Service Portal:

- Register a new business.
- Request services that are related to licenses, benefits, permits, and service requests.
- View services that they received.
- View information records that they requested.
- View all license or permit requests.
- View items that they received.
- View their existing cases.
- View business and child business profiles.
- View business contact information such as names, addresses, and other contact information.
- View publications, such as government pamphlets and newsletters about services.
- View notifications such as government notifications and new contact approvals.

Customizing the Government Service Portal

To customize this portal, navigate to **Service Portal > Portals** and select Government Service. See [Service Portal](#)  for more information about creating a custom interface.

Register for the Government Service Portal

Register for the Public Sector Digital Services Government Service Portal so that you can search for information, request assistance from a government service agent, or track the status of your request.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal
2. In the portal header, select **Register**.



Note:

Public Sector Digital Services does not support configuring of external user self-registration.

3. Select whether you want to register as a **Constituent**, a **Business contact**, or a **Business**.
4. Fill in the fields on the registration form.
Your email address must be unique. If you enter an address that is already in the system, you receive an error message. Try again with a different email address.
5. Select the **Security Code** check box, complete the CAPTCHA validation, and select **Verify**.
6. When prompted to agree to the privacy policy and to the community terms and conditions, select the agree check box.
7. Select **Sign Up**.
A verification email is sent to the email address that you provided.
8. Select the link in the email to verify your email address.

Result

Your registration is complete. You can now log in to the Government Service Portal.

Self-register a business account in the Public Sector Digital Services government service portal

As a business owner, you can self-register your business on the government service portal to gain access and to create a business profile.

Before you begin

Role required: none

Procedure

1. Go to the Government Service Portal page and select **Register** in the portal header.
2. When prompted, select **A new business**.
3. On the form, fill in the fields.
For more information on the business registration fields and the information that is collected when you sign up as a new business, see [Business Profile form](#).
4. Select the **Security Code** check box, complete the CAPTCHA validation, and select **Verify**.
5. Agree to the privacy policy and to the community terms and conditions by selecting the check box.
6. Select **Register**.
Your request is routed to an administrator, who can approve or deny the registration request. If the registration request is approved, you receive an email prompting you to set a user ID and password for login to the government service portal. If the registration request is denied, you're notified by email.

View or update a constituent profile in the government service portal

As a registered constituent, view your profile, update your information, and change your password directly on the Public Sector Digital Services government service portal.

Before you begin

Role required: sn_gsm.constituent

Procedure

1. Log in to the government service portal.
2. Select your user name in the portal header and select **Profile**.

3. To update the personal information in your profile, including your name, contact information, and address, do the following steps:
 - a. Select the field that you want.
 - b. In the pop-up window, enter the new information.
 - c. Select **Save**.
For more information on the fields, see [Agency Service Constituent Profile form](#).
4. To change your password, select **Change Password**.
The **Change Password** link appears on the government service portal profile only when the Self Service Password Reset plugin (com.snc.password_reset) is activated by an admin.
5. In the Change Password pop-up window, fill in the fields and select **Update**.
6. To manage your email notification preferences, select **Notification Preferences** and check the options that you want or clear the options that you don't want.
Your preferences are automatically saved.

Track your cases from the Government Service Portal in Public Sector Digital Services

Track your service request, information request, or license/permit request cases in the Government Service Portal by viewing a list of your cases and selecting the ones that you want to see more details about. Here, you can respond to an agent's inquiry, view a response, or see if there are any next steps required to resolve the case.

Before you begin

Role required: sn_gsm.constituent

About this task

Selecting a case opens a form with the following sections:

- A record of activity on the case, including added attachments or any interactions between the requester and the license and permit request case agent.
- Tasks or actions that must be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including contact information, the case number, and the case's stage and status.
- Any attached files.

Procedure

1. In the Government Service Portal portal header, navigate to **Your Cases**.
The following table lists the case categories that are visible:

Your Cases Category list

Category	Description
All Cases	List of all cases.
Action Needed	Cases in the Resolved state that are awaiting a constituent response.
Your Cases	Cases that haven't yet been submitted for resolution.

Category	Description
Your Requests	Cases that have been submitted for resolution and are awaiting an agent response.
Your Service Requests	All service request cases that a user has access to. The Service Requests list shows the following fields: ○ Service Request Number ○ Short Description ○ Constituent, Business, or Business Contact ○ State ○ Reported on
Your Information Requests	All information request cases that a user has access to. The Information Requests list shows the following fields: ○ Information Request Number ○ Short Description ○ Constituent, Business, or Business Contact ○ State ○ Reported on
Your Licenses/Permits	All license and permit request cases that a user has access to. The License and Permit Requests list shows the following fields: ○ License and Permit Request Number ○ Short Description ○ Consumer, Business, or Business contact ○ State ○ Reported on

2. In your list of cases, select the case number that you want to view more information about.

3. Optional: If you want to add a message for an agent, enter the message, and select **Post**. Your message becomes part of the case conversation. All responses from the agent are also included in the conversation, and you can see responses from other agents here.

Submit a social benefits application in the Public Sector Digital Services Government Service Portal

Submit an application for one or more social benefit programs offered by a government agency using the Government Service Portal in Public Sector Digital Services.

Before you begin

Role required: none

About this task

As a constituent, you can use the Public Sector Digital Services playbooks on service portals experience in the Government Service Portal to apply for one or more social benefit programs

offered by an agency that serves you. You can apply for more than one program using information from the primary application, and see if you are eligible for any additional programs based on the information you provide, depending on what the agency offers. You can also use the portal to view the status of existing applications, view your constituent benefits summary card, as well as add details, upload documents, or update your profile and contact information.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services > Social Benefits**.
3. Select the social benefits program you would like to submit an application for.
4. On the Answer eligibility questions activity card, confirm the primary applicant's eligibility using the eligibility questions, and select **Check Eligibility**.
The benefits card will display possible eligibility for each of the social benefits offered by the agency. An agent will review the details of your case to make a final determination.
5. If the applicant is deemed eligible for the benefit associated with the application currently open, select **Start Application**.
If the applicant is not eligible for the benefit associated with the application currently open, the application cannot move forward. The benefits card displays other social benefit programs the applicant may be eligible for, in addition to or instead of the benefit associated with the application currently open.
6. **Optional:** If you are submitting this application on behalf of another constituent or for a business contact, select the checkbox for **I am requesting on behalf of someone else**.
7. On the form, fill in the fields with the primary applicant's personal and financial information, including SSN, demographic information, location, and contact information.
8. **Optional:** Select the checkbox to indicate that the applicant would prefer to be contacted via SMS.
9. Select the next activity.
10. **Optional:** Add any people who would also be receiving benefits along with the primary applicant.
You may add more than one. Related people may include spouses, children, dependents, household members, or any person who may be receiving benefits along with the primary applicant.
11. Select the next activity.
12. **Optional:** If anyone in the applicant's household has a source of income, select **Yes**, and on the form, fill in the fields.
If no one in the applicant's household has a source of income, select **No**.
13. **Optional:** If anyone in the applicant's household has any pre-tax contributions on any of their current income, select **Yes**, and enter any pre-tax contributions that affect income for the applicant's household.
If no one in the applicant's household has any pre-tax contributions, select **No**.
14. Select the next activity.
15. **Optional:** If anyone in the applicant's household has any expenses or financial commitments, select **Yes**.
If no one in the applicant's household has any expenses or financial commitments, select **No**.
16. **Optional:** On the form, fill in the fields, doing so for each expense item.
You may add more than one. Select **Add Item** to add multiple expenses to the list.

17. Select the next activity.
18. If anyone in the applicant's household has any financial accounts, assets, or resources, select **Yes**, and on the form, fill in the fields.
You may add more than one. Select **Add Item** to add multiple expenses to the list. If no one in the applicant's household has any financial accounts, assets, or resources, select **No**.
19. Select the next activity.
20. Upload any supporting documents that verify the identity of the applicant and any related parties, or provide additional context for their request.
21. Select the next activity.
22. On the form, select the options that best describe the applicant's criminal history, communication preferences, and accessibility needs.
23. Select the next activity.
24. Review the application in its entirety and correct any errors before submitting the application, and select **Mark Complete**.
Select the pencil icon to navigate back to an activity that needs to be corrected.
25. Select the checkbox to acknowledge you have read and agree with the disclosures, and enter your signature.
If an admin has configured e-signature, you have the option of drawing or typing a signature.
26. Select **Submit**.
Your request is now routed to a Social Benefits case agent, who will process your application. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to verify information, confirm an interview date, or upload any additional documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.
27. **Optional:** Select **Apply Now** to use information from the current application to apply for other social benefits programs that the primary applicant may be eligible for.
You may apply for more than one. Each new application opens in a new browser tab. The option to create an appended case expires after a specified amount of time.
28. **Optional:** Select **Skip** to skip this activity.
The case state of the additional benefit application changes to "Not submitted". A new case can no longer be created and appended to the primary application.
29. Select **Mark Complete** once the desired applications are submitted.
The case is moved to the **Review** stage, where an agent will review the details of your request.

Creating a government service request with Public Sector Digital Services

You can create a case about a community question or issue from the Government Service Portal in Public Sector Digital Services. The Government Service Portal supports submissions by both registered and anonymous users.

Before you begin

Role required: none.

About this task

Constituents can use the Government Service Portal to request services and report issues in their community. They can also use the portal to view the status of existing service requests, as well as update their contact information.

Constituents can submit their non-emergency requests through the Government Service Portal self-service experience, through Virtual Agent, or using Engagement Messenger. For more

information on using Virtual Agent with Public Sector Digital Services, see [Get help with Public Service requests using Virtual Agent](#).

Create a service request as a registered user

Create a service request as a registered user in the Public Sector Digital Services application.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

As a constituent, you can use the Government Service Portal to request services and report issues in their community. You can also use the portal to view the status of existing service requests, as well as update their contact information.

As a constituent, you can submit non-emergency requests through the Government Service Portal self-service experience, through Virtual Agent, or by using Engagement Messenger. For more information on using Virtual Agent with Public Sector Digital Services, see [Get help with Public Service requests using Virtual Agent](#).

Procedure

1. Navigate to the Government Service Portal.
2. Select **Services > Service Requests** to expand the list of Service Requests categories that are offered by Public Sector Digital Services, and select the category that you want.
3. Select the Service Request issue that you want to report.
For more information on the services that are offered in the Government Service Portal, see [Government Service Portal service catalog list](#).
4. On the form, fill in the fields.

Create Case form

Field	Description
Location Type	Location type of the service request. The choices are: ○ Address ○ Intersection
Street Address	Address for this case, if Address is selected as the location type.
First Cross Street/Second Cross Street	Cross-streets for the case, if Intersection is selected as the location type.
Short Description	Brief description of the question, issue, or problem.
Details	Detailed description of the question, issue, or problem.
Contact Information	Contact information for the business or individual who reported this case.

5. Add any attachments.
6. Select **Submit**.

Result

The case is created, assigned a case number, and is now viewable in the **Your Cases** list in the Government Service Portal. For information on how to track the case as it moves through the

various stages, see [Track the status of a public service request from the Government Service Portal](#).

Create a service request as a public user

Create a service request as a public user in the Public Sector Digital Services application. You can submit a service request anonymously without logging in to the application.

Before you begin

Role required: none

About this task

Note:

To allow public users to submit service requests, certain settings must be configured by an administrator. For more information on how an administrator might configure these settings, see [Unauthenticated users cannot submit catalog items on Service Portal](#) .

Organizations usually customize their landing pages, and anonymous users may see different information than users who are logged in.

Procedure

1. Navigate to the Government Service Portal.
2. On the portal header, select **Services**.
3. Expand the list of Service Requests categories offered by Public Sector Digital Services by selecting **Service Requests**, and select the category that you want.
4. Select the Service Request issue that you want to report.
5. On the form, fill in the fields.

Create Case form

Field	Description
Location Type	Location type of the service request. The choices are: ○ Address ○ Intersection
Street Address	The address for this case, if Address is selected as the location type.
First Cross Street/Second Cross Street	The cross-streets for the case, if Intersection is selected as the location type.
Short Description	Brief description of the question, issue, or problem.
Details	Detailed description of the question, issue, or problem.
Contact Information	Option to report this case as a business or as an individual.

Note:

You may choose to leave the Contact Information fields blank, or you may add your email to receive updates on the case status. Adding attachments isn't supported as a public user.

6. Select the Security Code check box, complete the CAPTCHA validation, and select **Submit**.

You're taken back to the service request catalog, where you can submit another service request or register for an account.

Note:

If you didn't provide any contact information, you can't track the status of this request or see the details of the case after you select **Submit**. If you would like to check the status of this request after your submit it, you must register for an account. For instructions, see [Register for the Government Service Portal](#).

Create an information request with Public Sector Digital Services

Create a case requesting public records from federal or state public agencies from the Government Service Portal in Public Sector Digital Services.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

As a constituent, you can use the Government Service Portal to request and obtain copies of public records maintained by government agencies. For example, you can request access to state or local public records such as inspection reports, financial reports, corporate and property records, adoption records, and birth, death, or marriage certificates. You can also use the portal to view the status of existing information requests, as well as add details, upload documents, or update your contact information.

Users can submit a request for any public record, so long as it does not fall under one of nine exemptions:

1. Exemption One: Classified national defense and foreign relations information.
2. Exemption Two: Internal agency personnel rules and practices.
3. Exemption Three: Information that is prohibited from disclosure by another federal law.
4. Exemption Four: Trade secrets and commercial or financial information obtained from a person that is privileged or confidential.
5. Exemption Five: Inter-agency or intra-agency memoranda or letters that are protected by legal privileges.
6. Exemption Six: Personnel, medical, financial, and similar files the disclosure of which would constitute a clearly unwarranted invasion of personal privacy.
7. Exemption Seven: Certain types of information compiled for law enforcement purposes.
8. Exemption Eight: Records that are contained in or related to examination, operating, or condition reports prepared by, on behalf of, or for the use of any agency responsible for the regulation or supervision of financial institutions.
9. Exemption Nine: Geological and geophysical information and data, including maps, concerning wells.

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services > Information Requests**.
3. Select the desired type of information request.
You can choose between a FOIA request (federal) or a Public Records request (state).
4. Fill in your contact information.
If you're requesting information for someone else, select the **Requesting on behalf of someone else** check box.

5. Fill in the request details.
6. Fill in the fee details.
7. Request a fee waiver by selecting the **Fee Waiver** check box.
You may qualify for a fee waiver if you're making a request on behalf of a non-profit or educational institution.
8. **Optional:** If you need to request expedited processing, select the **Expedite Processing** check box.
9. **Optional:** Add any attachments, such as documentation required to verify your identity.
Required attachments vary by request.
10. Select **Submit**.
You're now taken to the case page, where you can review or update the details of your request. On this page, you can view the exemption checklist, which is a list of categories of information that are not available due to regulatory reasons. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request. You can access pending fee approvals on the **Notifications** tab.

Create a license or permit request in the Public Sector Digital Services Government Service Portal

Request a license or permit from a government agency using the Government Service Portal.

About this task

With Public Sector Digital Services playbooks on service portals, you get step-by-step guidance through the case flow process and the contextual information you need to complete each stage of the flow and its associated activities. The portal will also allow you the opportunity to see how pricing and fees change based on your selections.

Before you begin

Role required: none

About this task

As a constituent, you can use the Government Service Portal to request a permit or license. You can also use the portal to view the status of existing license and permitting requests, as well as add details, upload documents, or update your profile and contact information.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services > License & Permits**.
3. Select **Request License/Permit**.
4. If prompted, confirm eligibility.
5. On the form, fill in your contact information and the request information.
If the name to appear on the permit differs from that of the requester, enter that name here.
6. **Optional:** If you are submitting this application on behalf of another constituent or for a business contact, select the checkbox for **I am requesting on behalf of someone else**.
7. **Optional:** In the Individual Type dropdown, select **Constituent** or **Business**.
8. **Optional:** Enter the name of the constituent or business you are submitting the application on behalf of.

9. Optional: Add any additional related parties.

Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered and associated with your business.

10. Optional: Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.
Required documentation varies by request.**11. Optional:** Select any add-ons, such as permit endorsements.

You may add more than one. The pricing of the license or permit varies with each selection or combination of selections. If you are fee exempt, select the **Request Fee Waiver** checkbox to claim an exemption.

12. Review the fees associated with your choices.

The fee total changes dynamically based on the options selected.

13. Select the checkbox to acknowledge the Commercial Affidavit and DDR Affidavit.**14.** Enter your signature.

If an admin has configured e-signature, you have the option of drawing or typing a signature.

15. Add any attachments.**16.** Select **Submit**.**Result**

Your request is now routed to a License and Permit agent, who will process your request. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request, as well as upload any identification or supporting documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.

Related constituents and business contacts added to the license/permit application are now able to view the case details in the Government Service Portal.

Track the status of a public service request from the Government Service Portal

Monitor the status of a case that you submitted through the Government Service Portal in Public Sector Digital Services. On the case page, you can see when the case was created, when it was last updated, and whether it's awaiting a response from you or from an agent.

Before you begin

Role required: constituent, business_contact, business_partner

Procedure

1. Navigate to the Government Service Portal.
2. In the Government Service Portal header, select **Your Cases**.
The following table lists the case categories that are visible:

Your Cases Category list

Category	Description
All Cases	List of all cases.
Action Needed	Cases in the Resolved state that are awaiting a constituent response.

Category	Description
Your Cases	Cases that haven't yet been submitted for resolution.
Your Requests	Cases that have been submitted for resolution and are awaiting an agent response.
Your Service Requests	All service request cases that a user has access to. The Service Requests list shows the following fields: ○ Service Request Number ○ Short Description ○ Constituent ○ Business ○ Business Contact ○ State ○ Reported on

3. Under **Your Cases**, select the case number that you want.
The following table describes the fields that are displayed:

Government Service Portal Case Fields

Fields	Description
Timeline	Visual display that shows when the case was created and when it was last updated.
State	Current status of the case for the given stage. For a detailed explanation of each case state, see Government Service Portal Case states .
Constituent, Business, or Business Contact	Contact information for the reporting party.
Service	Type of service being requested.
Stage	Phase through which a case moves. For a detailed explanation of each case stage, see Government Service Case type .
Location Type	Option that indicates whether the location of the issue is an address or intersection.
Address or Cross Streets	Address or cross streets where the issue is located.
Related tabs	Additional case information, activity, or comments. The Related tabs show the following fields: ○ Activity ○ Attachments ○ Related Tasks You can add attachments or comments here.

Manage your government service cases from the Government Service Portal

Create, accept, assign, escalate, de-escalate, cancel a case, and even more actions for various government services all from the Government Service Portal.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Navigate to the Government Service Portal.
2. Do one of the following actions that are related to your case:

Service Request Case Actions

Action	Description
Create Case	Creates a case and associates the new case with the originating case. The new case appears in the Related Cases related list. This action displays the Select Case Type pop-up window where you can select the type of case to create.
Accept	Accepts an assigned case. This action is performed by the logged-in user.
Assign to me	Assigns the case to the logged-in user. This action is available if the case is unassigned and the logged-in user has the correct role.
Compose Email	Opens an email window in a new sub-tab on the Case tab. ○ The To field displays the customer's email address. ○ The Subject field displays the case number and issue. This action is available from the More UI Actions menu.
Escalate Case	Escalates the case, which highlights the case and raises awareness about a customer or issue. This action is available if the logged-in user has the correct role.
De-escalate Case	De-escalates a case. This action is available if a case has been escalated and the logged-in user has the correct role.

Action	Description
Report Knowledge Gap	Opens a knowledge feedback task in a new sub-tab for the case. After being saved, the task appears in the Knowledge Gaps related list. This action is available from the More UI Actions menu.
Propose Solution	Enables the agent to propose a solution for a case.
Record Time	Records the time worked for the case or case tasks. Selecting Record Time opens a Time Worked form with the Task and User fields already populated. This action is available from the More UI Actions menu.
Create Work Order	Creates a work order for the case. After a work order is created, it appears in the Work Orders related list. The case number is also referenced on the work order. This action is available from the More UI Actions menu.
Close Case	Closes a case. This action is available after a resolution code and any information related to the closure is provided in the Resolution notes field.
Open case	Changes the state of a case from Awaiting Info to Open.
Submit application	Saves the application and moves the state of the case from Draft to New. This action is available when the state of a case is Draft.
Request Info	Requests information about a case or case task from the constituent, business, or agency. This action is available when the state of a case is not Draft, Resolved, Closed, or Cancelled.
Start Work	Begins work on an open case. This action is available to the agent who is assigned to the task when the state of a case is Open.
Cancel	Updates the state of the case to Cancelled.

Action	Description
	This action is available when the state of a case is not Resolved, Closed, or Cancelled.

These actions are inherited by the case types that are created by extending the service case type.

The actions in the following table are available with the cases when the corresponding plugins are activated.

Actions available with corresponding case plugins

Plugin	Action
Service Management	○ Create Incident ○ Create Standard Change ○ Create Problem
Major Case Management	Shows all major case actions.
Special Handling Notes	Shows any special handling notes for the case.
Case Action Status	Indicates the current action state.

Create and submit License or Permit request applications on behalf of others

In the Government Service Portal, constituents can create license/permit requests on behalf of someone else, and add multiple parties (constituents, business contacts) to the watchlist.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services > License & Permits**.
3. Select **Request License/Permit**.
4. If prompted, confirm eligibility.
5. On the form, fill in your contact information and the request information.
If the name to appear on the permit differs from that of the requester, enter that name here.
6. Select the checkbox for **I am requesting on behalf of someone else**.
7. In the Individual Type dropdown, select **Constituent** or **Business**.
8. Enter the name of the constituent or business you are submitting the application on behalf of.
9. **Optional:** Add any additional related parties.
Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered and associated with your business.
10. **Optional:** Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.
Required documentation varies by request.

11. Optional: Select any add-ons, such as permit endorsements.

You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.

12. Review the fees associated with your choices.

The fee total changes dynamically based on the options selected. If you are fee exempt, select the **Request Fee Waiver** checkbox to claim an exemption.

13. Select the checkbox to acknowledge the Commercial Affidavit and DDR Affidavit.**14.** Enter your signature.

If an admin has configured e-signature, you have the option of drawing or typing a signature.

15. Add any attachments.**16.** Select **Submit**.**Result**

Your request is now routed to a License and Permit agent, who will process your request. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request, as well as upload any identification or supporting documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.

The constituent for which you were acting as a proxy, as well as any related constituents and business contacts added to the license/permit application, is now able to view the case details in the Government Service Portal.

Email notifications for the Service Request Case Type

Email notifications are automatically triggered by both the Government Service Portal and Service Request Playbook in Public Sector Digital Services. Notifications can result from an agent action, a response needed from an agent, constituent, or business contact, or from an update on a case status.

Email notifications in the Service Request Playbook are automatically sent to the constituent, business, agency, or contributor watchlist, when an agent performs one of the following case activities:

- Opens a case for a constituent
- Comments on a constituent's case
- Moves the case to another stage
- Provides a resolution for a constituent's case
- Closes a constituent's case
- Cancels a constituent's case
- Requests more information on the unresolved case

Email notifications are automatically sent to the assigned agent when:

- A case is assigned to the agent.
- A case needs attention or requires an agent response.
- Case work notes or comments are updated.
- A case task is assigned.
- There's new activity on the case.

- The proposed solution is rejected.
- There's a service level agreement (SLA) warning or breach.

Business contacts, contributors, other agents, and other constituents that are added to the case watchlist should receive all email notifications that are also received by the constituent who submitted the request.

For agents, email notifications in the Government Service Portal or Service Request Playbook can also be triggered by certain SLAs. For more information on SLAs for agents, see [Service level agreements for government service cases](#).

Service level agreements for government service cases

A service level agreement (SLA) is a record that you use to guarantee a specific time that a service or information must be provided by, or that an agent must finish a task must by. The Public Sector Digital Services application uses SLAs with government service request cases.

You can attach an SLA to a service request in the Government Service Portal or to a service request in the Service Request Playbook. You can configure an SLA to start, pause, or stop depending on any government service case attributes that you or someone else assigned to the SLA.

An SLA is automatically associated to a case when the case is created or updated depending on the conditions that have been set up in the SLA definition. The specific record that gets attached to a case is the Task SLA record, which tracks the SLAs for that particular case. The Task SLA table [task_sla] stores the Task SLA records. For more information on SLA definitions, see [Service Level Agreement \(SLA\) definition](#).

An SLA sends notifications at certain events that are defined in the workflow. For information on defining SLA workflow events, see [Create an SLA definition](#).

By default, SLA notifications are triggered and sent to the assigned agent on the following occasions:

- A Service Request case is in the Intake stage for more than two days.
- A Service Request case is in the Review stage for more than eight days.
- A Service Request case is in Processing stage for more than eight days.
- A Service Request case is in the Decision stage for more than two days.
- A constituent's comment or query hasn't been responded to for two days.
- An SLA is at 50 percent of the duration that is specified in the SLA definition.
- An SLA is at 75 percent of the duration that is specified in the SLA definition. A notification is sent to the agent and agent manager.
- An SLA is breached. A notification is sent to the agent and agent manager.

An SLA's timer pauses when the case is awaiting information from the constituent who had a comment or query. The timer is canceled if the state of the case changes to **Closed** or **Cancelled**.

To learn more about SLAs, see [Service Level Management concepts](#).

Get help with Public Service requests using Virtual Agent

Public sector users can get assistance completing or updating their requests for various public services by using a pre-built Virtual Agent chatbot conversation. Users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger. Virtual Agent is currently supported by Service Request Playbook and License and Permit Playbook.

Note:

Requires Glide Virtual Agent (com.glide.cs.chatbot) plugin.

Get help with service requests using Virtual Agent

Public sector end users can get assistance completing or updating non-emergency service requests by using a pre-built Virtual Agent chatbot conversation. End users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

The information (user inputs and bot responses) exchanged during the Virtual Agent conversation, Create a Service Request, enables the chatbot to assist users with non-emergency service requests.

Procedure

1. Navigate to the Government Service Portal or to the Engagement Messenger module if implemented.
2. Click **Chat**.
3. Select **Show me everything**.
4. Create or update a non-emergency service request by selecting **Create a Service Request**.

Virtual Agent asks the user whether this is a new request or an update to an existing request.

- For new requests, the bot displays categories of non-emergency services that the user can choose from.
 - If the user needs a service that isn't offered, the user can enter a short description of the issue and continue working with the bot to create a service request.
 - If the issue requires a location to be specified, the bot prompts the user to enter the address or intersection of the issue.
- For existing requests, the bot displays the list of cases for service requests submitted by the user and then prompts the user to update the case by adding an image or comment about the case.

The bot creates or updates the case for the service request. The user can continue working on a different issue with the bot or indicate that no further help is needed, which ends the Virtual Agent conversation.

Get help with license and permit requests using Virtual Agent

Public sector users can get assistance completing or updating their requests for license and permit services by using a pre-built Virtual Agent chatbot conversation. Users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

The information (user inputs and bot responses) exchanged during the Virtual Agent conversation, Create a Service Request, enables the chatbot to assist users with non-emergency service requests.

Procedure

1. Navigate to the Government Service Portal or to the Engagement Messenger module if implemented.
2. Click **Chat**.
3. Select **Show me everything**.
4. Create or update a license or permit request by selecting **Start a License/Permit Application**.

Virtual Agent asks the user whether this is a new request or an update to an existing request.

- For new requests, the bot displays categories of license and permit services that the user can choose from.
 - If the user needs a service that isn't offered, the user can enter a short description of the issue and continue working with the bot to create a request.
 - If the issue requires a location to be specified, the bot prompts the user to enter the address.
- For existing requests, the bot displays the list of license and permit requests submitted by the user, and then prompts the user to update the case with an image, comment, file, or additional information.

The bot creates or updates the case for the license and permit request. The user can continue working on a different issue with the bot or indicate that no further help is needed, which ends the Virtual Agent conversation.

Using Playbooks for Public Sector Digital Services

A playbook provides government service agents with step-by-step guidance through the life cycle of a public service request case. Use Playbooks to fulfill requests for license and permits, government records and other public information, or non-emergency service requests.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.

When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The following applications are available with Public Sector Digital Services that enable you to create and use playbooks:

- [Social Benefits Playbook](#)
- [License and Permit Playbook](#)
- [Information Request Playbook](#)
- [Service Request Playbook](#)

The corresponding playbook for each case type automatically appears in the **Playbook** tab when you create a public service request case as an agent in the CSM Configurable Workspace, or when a constituent puts in a request through the Government Service Portal.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the public service case workflow.

The screenshot shows the ServiceNow interface for a case titled "Application for Commercial Fishing License". The form is divided into several sections:

- Case Information:** Contains fields for Number (LPC0001172), Opened (2023-11-28 10:38:50), Priority (4 - Low), Business (Boxeo), Business contact (George Warren), Channel (Web), Product (Commercial Fishing Permit), and Service (Commercial Fishing Permit).
- Record Information:** Includes an Overview section with the case details and a Contact section for George Warren, Network Administrator.
- Timeline:** A section at the bottom right showing the history of the case.

Playbook stages

Each playbook contains four stages (Intake, Review, Process, and Decision) and several activities in each stage. Below is a diagram illustrating the base playbook workflow. This workflow can be modified to match a specific public service request use case, depending on what your agency offers.

The base Playbook workflow stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details.
Process	Guides you through the activities for request fulfillment.
Decision	Captures and communicates the decision and any supporting information to the constituent and any other agents or involved parties.

Playbook layout

A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

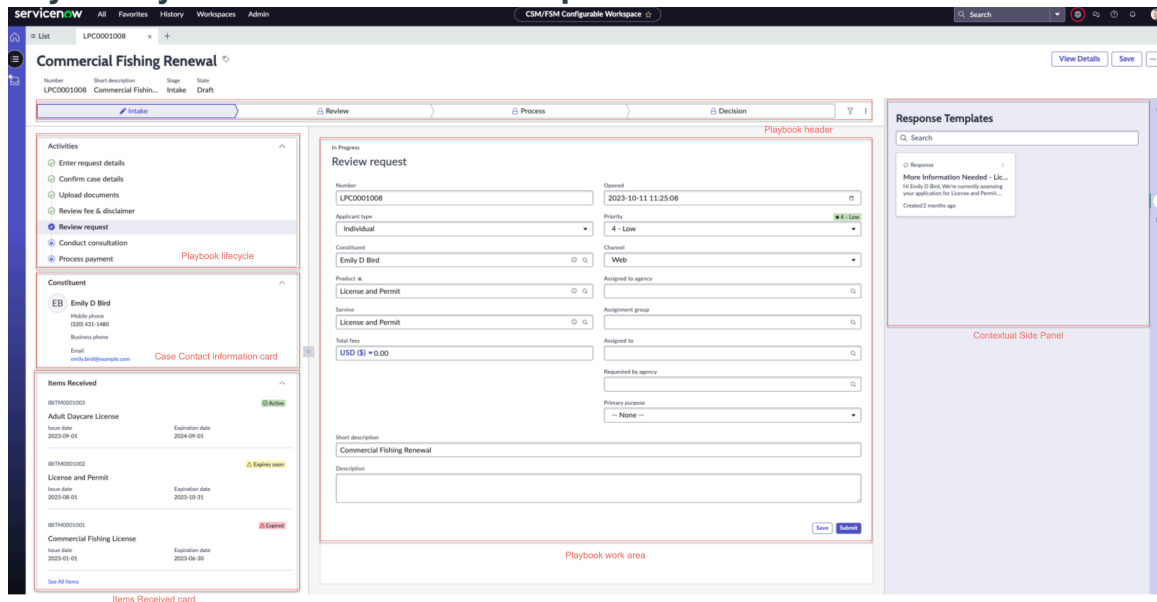
The default activity view for Playbooks in Public Sector Digital Services is the process-based experience view. This view, which is shown in the following example, shows constituent or

business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based Experience



The following table shows the components shown in the Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.

Playbook components (continued)

Playbook area	Description
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information: ◦ Case or case task activity stream. ◦ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ◦ Dynamic related records. For more information, see Dynamic related records.
Case Information Contact Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.
Service Request Map Card	• <i>Service Request Playbook only</i> • New component of the process-based playbook layout. • Appears after the intake stage, if the sn-geo-map plugin is installed, and Google API key is configured.
Items Received Card	• <i>License and Permit Playbook only</i> • Appears on the left side of the playbook. • Shows licenses/permits that are active, expired, and expiring soon, and the time remaining on each one.

Public Sector Digital Services Playbooks

The Public Sector Digital Services platform includes the following playbooks:

Social Benefits Playbook

The Social Benefits Playbook application provides an end-to-end workflow for handling requests for social benefits submitted by public sector end users. The application includes the following:

- Packaged playbook that deploys out of the box case types, playbooks, business logic, SLAs, notifications and more to automate workflow to orchestrate the process and help agents resolve requests faster and efficiently.
- Customizable catalog of pre-built social benefit options that constituents and businesses can choose from on the Government Service Portal.
- Extendable data model through service definitions.

License and Permit Playbook

The License and Permit Playbook application provides an end-to-end workflow for handling license and permit requests submitted by public sector end users. The application includes the following:

- Packaged playbook that deploys out of the box case types, playbooks, business logic, SLAs, notifications and more to automate workflow to orchestrate the process and help agents resolve requests faster and efficiently.
- Customizable catalog of pre-built license and permit request options that constituents and businesses can choose from on the Government Service Portal.
- Extendable data model through service definitions.

Information Request Playbook

The Information Request Playbook application provides an end-to-end workflow for handling public record and information requests submitted by public sector end users. The application includes the following:

- Service catalog of pre-built, information request options that constituents and businesses can choose from on the Government Service Portal.
- Automated workflow process that agents use to resolve information requests faster and efficiently.
- If using Advanced Work Assignment, an Information Request service channel that admins can use to automatically route information requests to designated agents.

Service Request Playbook

The Service Request Playbook application provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users. The application includes the following:

- Service catalog of pre-built, non-emergency request options that constituents and businesses can choose from on the Government Service Portal.
- Automated workflow process that agents use to resolve non-emergency service requests faster and efficiently.
- If using Advanced Work Assignment, a Service Request service channel that admins can use to automatically route non-emergency service requests to designated agents.
- Pre-built Virtual Agent conversation topic that enables constituents and businesses to use Virtual Agent to submit non-emergency service requests.

For more information on installing and configuring Playbooks for Public Sector Digital Services, see [Configuring Public Sector Digital Services](#).

Using Social Benefits Playbook

If you're a social benefits case agent or manager, you can use the Social Benefits Playbook for Public Sector Digital Services to manage and resolve requests for social benefits.

The Social Benefits Playbook automatically appears in the **Playbook** tab when you create a social benefits request case by using the CSM Configurable Workspace. A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

Playbook stages

Like other Public Sector Digital Services playbooks, this playbook contains four stages (Intake, Review, Process, and Decision) and several activities in each stage. Below is a diagram illustrating the base Social Benefits Playbook workflow. This workflow can be modified by an admin to match a specific social benefits use case.

The Social Benefits Playbook stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the social benefits request and assigning it to the right agent.
Review	Acts as a checkpoint for eligibility verification and provides you with an opportunity to review the case details.
Process	Guides you through the activities for social benefits request fulfillment.
Decision	Captures and communicates the decision and next steps to the constituent and any other agents or involved parties.

Playbook layout

The following figure shows the components that you can see in the Social Benefits Playbook workspace.

Playbook layout with the Process-based Experience view

The screenshot displays the ServiceNow Playbook interface for a constituent named Jerry Rice. The layout is organized into four main components:

- Playbook Header:** Located at the top, it shows the title 'Nutrition Assistance - Jerry Rice' and a horizontal stage picker with stages: Intake, Review, Process, and Decision. The current stage is 'Intake'.
- Playbook Lifecycle:** A vertical panel on the left side showing a list of activities for the 'Intake' stage. Activities include 'Answer eligibility questions', 'Enter primary applicant information', 'Add people', 'Provide income information', 'Disclose financial commitments', 'List accounts and other assets', 'Upload documents', 'Answer additional questions', 'Confirm application details', and 'Sign and submit'.
- Playbook Work Area:** The central area containing a form for demographic and contact information. It includes sections for 'Demographic information' (Race, Ethnicity, Education level, Military status, Disability status, Citizenship status, Tribal affiliation, Is the applicant currently homeless?), 'Location & contact information' (Street, City, State / Province, Zip / Postal code, Country), and 'Preferred communication method' (Call, Email, Text, etc.).
- Contextual Side Panel:** A vertical panel on the right side showing an overview of the constituent (Jerry Rice) and a timeline of events. It also includes a 'Social Benefits Intake' section.

Playbook components

Playbook area	Description
Playbook header	- Appears at the top of the playbook. - Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. - Includes a filter that you can use to filter the activities by the assigned user or the activity status. - Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Life-cycle	- Appears in a panel on the left side of the playbook. - Displays a list of the activities for each stage. - With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	- Appears in the middle of the playbook. - Displays the card for the current activity.
Contextual side panel	- Appears on the right side of the playbook. - Includes the tabs that you can use to display the following types of information:

Playbook components (continued)

Playbook area	Description
	○ Case or case task activity stream. ○ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ○ Dynamic related records. For more information, see Dynamic related records.
Case Information Contact Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook. • Displays the preferred communication method indicated by the applicant. • Allows an agent to start an email draft directly from the playbook workspace by selecting the applicant's email address. • Displays the identity type provided by the applicant, either SSN, Driver's License, Medicare, or State Identification number.
Items Received Card	• Appears on the left side of the playbook. • Shows licenses/permits that are active, expired, and expiring soon, and the time remaining on each one.
PaCE policy card	• Appears in the contextual side panel during the Propose decision activity of Process stage. • Provides agents additional insight into eligibility criteria via a link to a corresponding KB article containing the full text of the policy.

Resolving a social benefits case using Social Benefits Playbook

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note:

Verify that the Social Benefits Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see [Install and configure the Social Benefits Playbook application](#).

By default, the following stages are available to you as a government service agent in the Social Benefits Playbook in the CSM Configurable Workspace.

- Intake
- Review
- Processing
- Decision

Case Stages in Social Benefits Playbook

The Social Benefits Playbook experience starts with the **Intake** stage. This stage is the default playbook stage for a new social benefits request case.

Use this playbook stage to gather and confirm information about the applicant, the social benefit program being applied for, and whether the applicant is eligible for this type of social benefit program. You can also request additional information from the applicant at this stage, upload additional documents, add additional beneficiaries, and schedule a interview, if needed.

If the case was submitted by a constituent through the Government Service Portal, the constituent will be able to upload documents, review proposed benefits, and respond to interview requests before the case continues. At the end of the Intake stage, agents must review and verify the information provided before proceeding.

The playbook continues with the **Review** stage. In this stage, agents must review and verify the information provided, verify supporting documents and credentials (and flag any for follow-up), check for duplicate requests, and set up any interviews needed for social benefit program approval. You can move the case to the next stage when all documents have been verified and there are no pending case tasks.

The playbook continues with the **Process** stage. In this stage, the agent proposes their decision. The case might then be routed to a higher-tier agent, who can assess the entire application, create any additional case tasks, request or perform additional interviews, add or request additional information, or simply approve or deny based on the information provided. Once requests for any additional information and any open case tasks are complete and all agents have reached a decision, the case is moved to the **Decision** stage.

The final stage of the Social Benefits Playbook is the **Decision** stage, where the status of the decision is relayed to the constituent. The status of the social benefit application is changed to **Granted**, and the social benefit program can be routed to the constituent. A notification is sent to the applicant via the Government Service Portal, letting them know that their application has been approved.

Complete the Intake stage in Social Benefits Playbook

Complete the Intake stage as your first step in resolving a case using the Social Benefits Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > Social Benefits > All**.
2. Select **New** to create a case.
3. Select **Create Case**.
The Social Benefits Playbook opens and initiates the first activity for collecting the request details and determining eligibility for the social benefits offered by your agency.
4. On the Answer eligibility questions activity card, confirm the applicant's eligibility using the eligibility questions, and select **Check Eligibility**.
The benefits card will display possible eligibility for each of the social benefits offered by the agency. An agent can review the details of the case to make a final determination.
5. If the applicant is eligible for the benefit associated with the application currently open, select **Start Application**.
If the applicant is not eligible for the benefit associated with the application currently open, the application cannot move forward. The benefits card displays other social benefit programs the applicant may be eligible for, in addition to or instead of the benefit associated with the application currently open.
6. On the form, fill in the fields with the primary applicant's personal and financial information, including SSN, demographic information, location, and contact information.
7. **Optional:** Select the checkbox if the customer has indicated that they would prefer to be contacted via SMS.
8. Select **Mark Complete** to continue to the next activity.
9. **Optional:** Add any people who would also be receiving benefits along with the primary applicant.
You may add more than one. Related people may include spouses, dependents, children, household members, or any person who may be receiving benefits along with the primary applicant.
10. Select **Mark Complete** to move to the next activity.
11. **Optional:** If anyone in the applicant's household has a source of income, select **Yes**, and on the form, fill in the fields.
If no one in the applicant's household has a source of income, select **No**.
12. **Optional:** If anyone in the applicant's household has any pre-tax contributions on any of their current income, select **Yes**, and enter any pre-tax contributions that affect income for the applicant's household.
If no one in the applicant's household has any pre-tax contributions, select **No**.
13. Select **Mark Complete** to move to the next activity.
14. **Optional:** If anyone in the applicant's household has any expenses or financial commitments, select **Yes**.
If no one in the applicant's household has any expenses or financial commitments, select **No**.
15. **Optional:** On the form, fill in the fields, doing so for each expense item.
You may add more than one. Select **Add Item** to add multiple expenses to the list.
16. Select **Mark Complete** to move to the next activity.
17. If anyone in the applicant's household has any financial accounts, assets, or resources, select **Yes**, and on the form, fill in the fields.
You may add more than one. Select **Add Item** to add multiple expenses to the list. If no one in the applicant's household has any financial accounts, assets, or resources, select **No**.
18. Select **Mark Complete** to move to the next activity.

19. Upload any supporting documents that verify the identity of the applicant and any related parties, or provide additional context for their request.
A case is created with the information the agent has provided on the applicant thus far, and is now routed back to the applicant via the Government Service Portal. There, they can upload any applicable identity documents, credentials, or supporting documentation required for their application. The case continues once the applicant has uploaded these documents. Required documentation varies by request.
20. Once the applicant has uploaded supporting documentation via the Government Service Portal, review the attachment(s) and select **Mark Complete** to move to the next activity.
21. On the form, select the options that best describe the applicant's criminal history, communication preferences, and accessibility needs.
22. Select **Mark Complete** to move to the next activity.
23. Review the application in its entirety and correct any errors before submitting the application.
24. Select **Request Signature** to request a signature from the constituent via the **Sign and Submit** activity on the Government Service Portal.
If the constituent does not respond, you may move this application directly to the **Decision** stage, where the case can be closed.
Once the constituent has completed the **Sign and Submit** activity via the Government Service Portal, the case is automatically moved to the next activity.
25. **Optional:** Select **Apply Now** to use information from the current application to apply for other social benefits programs that the applicant may be eligible for.
You may apply for more than one. Each new application opens in a new browser tab. The option to create an appended case expires after a specified amount of time.
A child Social Benefits case is appended to the case of the original benefit application, and the benefit card updates based on the status of the new application.
26. **Optional:** Select **Skip** to skip this activity.
The case state of the additional benefit application changes to "Not submitted". A new case can no longer be created and appended to the primary application.
27. Select **Mark Complete** once the desired applications are submitted.
The case is moved to the **Review** stage, and the **Intake** stage is marked complete.

Complete the Review stage in Social Benefits Playbook

Complete the Review stage as your second step in resolving a case using the Social Benefits Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the information collected during the intake stage, and confirm that the information is complete and correct.

If the agent is selecting the case from an unassigned queue, they will see the option to **Assign to Me**. If the case is auto-assigned, they will see the option to **Mark Complete**.

2. Correct any errors before submitting the application, and select **Mark Complete**.
Select the pencil icon to navigate back to an Intake stage activity that needs to be corrected.
3. Verify there are no duplicate benefit applications for the primary applicant, and select **Mark Complete**.

4. Review and verify the files and supporting documentation attached to the application.
Here, you can flag documents for further verification, request additional documents, or close the case by moving it directly to Decision.
5. Select **Mark as Complete** once all documents have been verified and any flagged documents have been resolved.
6. Select a date and time in the dropdown menu to recommend an interview slot if an interview is required to process the application, and select **Request Interview**
The interview is now routed to the applicant, who can accept, reject, or respond to the interview request via the Government Service Portal. The case continues once the applicant has responded to the request. If an interview is not required, select **Skip**.
7. Select **Move to Process** once the interview is complete.

Result

The case is now moved to the **Process** stage.

Complete the Process stage in Social Benefits Playbook

Complete the Process stage as your third step in resolving a case using the Social Benefits Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the auto-calculated eligibility assessment and the benefit summary card, which uses application information as an input to provide guidance on the benefit amount for which an applicant may qualify.
This engine utilizes information such as the total household income, assets owned, expenses, etc. as inputs into the calculation.
2. Select **Grant** or **Deny** in the Proposed Decision dropdown to propose a decision for the applicant's social benefits case.
3. Enter a justification for the proposed decision in the description box, then select **Propose Decision**.
The case is now routed to an approval agent. The Process stage will complete automatically once the decision is approved.

Result

The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in Social Benefits Playbook

Complete the Decision stage as your last step in resolving a case using the Social Benefits Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Enter the resolution code and cause.
2. Enter resolution notes outlining the case decision for the applicant, or other users on the case watch-list.
3. Select the checkbox for **Add resolution notes to comments** if these notes are to be shown to the applicant.
4. Select **Close** to close and resolve the case.
A notification is sent to the applicant that lets them know that the request is completed.

Add a beneficiary to a social benefits application

As an agent, you can add multiple beneficiaries to an existing request for social benefits. Applicants, or the representatives of an applicant, can also add additional beneficiaries to an application through the Government Service Portal. Beneficiaries are people that share the household or are related to the applicant who will benefit from the assistance being provided.

Before you begin

Role required: admin

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > Social Benefits > All**.
2. Select **New** to create a case.
3. Select **Create Case**.
4. On the Answer eligibility questions activity card, confirm the applicant's eligibility using the eligibility questions, and select **Check Eligibility**.
5. If the applicant is eligible for the benefit associated with the application currently open, select **Start Application**.
6. On the form, fill in the fields with the primary applicant's personal and financial information, including SSN, demographic information, location, and contact information, and select **Mark Complete** to continue to the next activity.
7. Add any people who would also be receiving benefits along with the primary applicant.
You may add more than one. Related people may include spouses, dependents, children, household members, or any person who may be receiving benefits along with the primary applicant.
8. Select **Mark Complete**.

Using License and Permit Playbook

If you're an license and permits case agent or manager, you can use the License and Permit Playbook for Public Sector Digital Services to manage and resolve requests for licenses and permits.

A playbook provides you with step-by-step guidance through the life cycle of a license and permits request case.

The License and Permit Playbook automatically appears in the **Playbook** tab when you create an license and permit request case by using the CSM Configurable Workspace.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.

When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

Playbook stages

Like other PSDS playbooks, this playbook contains four stages (i.e., Intake, Review, Process, and Decision) and several activities in each stage. Below is a diagram illustrating the base License & Permit playbook workflow. This workflow can be modified to match a specific license/permit use case.

The License and Permit Playbook stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the license and permit request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details.
Process	Guides you through the activities for the license and permit request fulfillment.
Decision	Captures and communicates the documents and information to the constituent and any other agents or involved parties.

Playbook layout

A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for the License and Permit Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based Experience view

The screenshot displays the ServiceNow Playbook interface for a 'Commercial Fishing Renewal' case. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The main header shows the case number 'LPC0001008' and the title 'Commercial Fishing Renewal'. Below the header, a horizontal stage picker shows 'Intake', 'Review', 'Process', and 'Decision'. The 'Review' stage is currently active. The main content area is divided into three sections: a left sidebar, a central form, and a right sidebar. The left sidebar contains 'Activities' (a list of tasks to be completed) and 'Items Received' (a table of licenses and permits). The central form is titled 'Review request' and contains various fields for case details, including 'Number', 'Opened', 'Applicant type', 'Priority', 'Channel', 'Product', 'Service', and 'Total fees'. The right sidebar is titled 'Response Templates' and contains a search bar and a list of templates. The bottom of the page is labeled 'Playbook work area'.

The following table shows the components that you can see in the License and Permit Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.

Playbook components (continued)

Playbook area	Description
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information: ○ Case or case task activity stream. ○ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ○ Dynamic related records. For more information, see Dynamic related records.
Case Information Contact Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.
Items Received Card	• Appears on the left side of the playbook. • Shows licenses/permits that are active, expired, and expiring soon, and the time remaining on each one.

Resolving a license and permit case using License and Permit Playbook

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note:

Verify that the License and Permit Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see [Install and configure the License and Permit Playbook application](#).

By default, the following stages are available to you as a government service agent in the License and Permit Playbook in the CSM Configurable Workspace.

- Intake
- Review
- Processing
- Decision

Case Stages in License and Permit Playbook

The License and Permit Playbook experience starts with the **Intake** stage. This stage is the default playbook stage for a new license and permit request case.

Use this playbook stage to gather and confirm information about the requester, the license or permit being requested, whether the requester is eligible for this type of license or permit, and whether they are exempt from the fees associated with the license or permit. You can also request additional information from the requester at this stage, upload additional documents, add additional comments, add related parties, and schedule a consultation through the work notes.

If the case was submitted by a constituent through the Government Service Portal, the constituent will be able to upload documents, and review the fees and disclaimers associated with the license or permit application before the case continues. At the end of the Intake stage, agents must enter details about the payment that was processed or waived.

The playbook continues with the **Review** stage. In this stage, you can do the initial troubleshooting on the case, verify supporting documents and credentials, and set up any inspections needed for license or permit approval. You can move the case to the next stage when details are provided in the work notes on the inspections (open work orders or work performed during) or verifying documents.

The playbook continues with the **Process** stage. In this stage, the case might be routed to a higher-tier agent, who can assess the entire request for the license or permit, approve a fee exemption, create case tasks, request or perform additional inspections, and add or request additional information.

Once requests for any additional information and any open case tasks are complete, the case is moved to the **Propose Decision** activity. Additional information may be solicited from the requester at any time during this stage. After the decision, often made by a higher-tier agent, is proposed, it is routed to the original agent, who may request or perform their own additional inspections, and add or request more information. This agent then has the option of confirming or vetoing the decision proposal of the other agent.

The final stage of the License and Permit Playbook is the **Decision** stage. At the Decision stage, the status of the license or permit is changed to **Granted**, and the license or permit can be generated and routed to the constituent. A notification is sent to the requester that lets them know that license or permit approval has been obtained and the requested license or permit has been digitally generated within the playbook, and delivered via the Government Service Portal.

The requester can then either accept or reject the license or permit. If the requester accepts the outcome, the case is automatically closed. If the requester rejects the solution, the case is

reopened, and the agent must propose another outcome. A request for a license or permit may also be conditionally approved, or denied. The agent can specify why in the work notes.

Complete the Intake stage in License and Permit Playbook

Complete the Intake stage as your first step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > License & Permit Requests > All**.
 2. Select **New** to create a case.
 3. Select **General License/Permit** under the Service dropdown, and **New License/Permit Request** under the Case Type dropdown.
 4. Select **Create Case**.
The License and Permit Playbook opens and initiates the first activity for collecting the request details.
 5. On the Enter Application Details activity card, confirm the applicant's eligibility and select **Continue**.
 6. On the form, fill in the fields with the requester's contact information and details of the request.
 7. Under Representation, select the checkbox for **Requesting on behalf of someone else**.
 8. Enter the name of the constituent or business that the requester is submitting the application on behalf of, and select **Save**.
- Note:**
All license/permit co-applicants must have a business contact account associated with your business to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see [Create a business contact account from license or permit application data](#).
9. **Optional:** Select any add-ons, such as permit endorsements.
You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.
 10. Review the fees associated with the requester's choices.
The fee total changes dynamically based on the options selected. If the constituent or requester is fee exempt, select the **Fee Waiver** checkbox and enter a justification to claim an exemption for them.
 11. Select **Submit** to move to the next activity.
 12. Add any additional related parties.
Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered on the Government Service Portal and associated with your business.
 13. Select **Mark Complete** to move to the **Upload Documents** activity.
 14. Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.

A case is created with the license or permit request information and all related parties, and is now routed to the constituent via the Government Service Portal, where they can upload any applicable identity documents, credentials, or supporting documentation required for this license/permit request. The case continues once the constituent has uploaded these documents. Required documentation varies by request.

15. Once the constituent has uploaded supporting documentation, review the attachment(s) and select **Mark Complete** to move to the **Review Fees & Disclaimer** activity.
The case is again routed to the constituent via the Government Service Portal, where they can upload fee waiver justification documents, if applicable, or other supporting documentation required for this license/permit request. The case continues once the constituent has uploaded these documents and acknowledged the fees and disclaimers.
16. Once the constituent has acknowledged the fees and disclaimers, the case is moved to the queue, where it can be picked up by another agent in your agency, who will review the request and provide appointment options for the license or permit consultation.
17. Select **Mark Complete** to acknowledge that you have reviewed the request.
18. Enter available times in the work notes.
19. Select **Schedule Consultation**
The case is again routed to the constituent via the Government Service Portal, where they can accept or reject the times proposed for an interview consultation or inspection.
20. After the consultation, enter any relevant notes about the case in the work notes and select **Mark Complete** to move to the next activity.
21. Payment.
22. Select **Move to Review**.
The case is moved to the **Review** stage, and the **Intake** stage is marked complete.

Complete the Review stage in License and Permit Playbook

Complete the Review stage as your second step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the files attached to the case, and confirm that the requester has included the required documents to validate their identity by selecting the boxes associated with the document type.
2. Select **Mark as Complete**.
3. Select any exemptions that apply to the case, and select **Mark as Complete**.
If no exemptions apply to the case, select **No exemption code(s) applicable**.
4. Do one of the following actions depending on whether you have similar or linked completed requests.
5. Estimate the fees associated with this request by using the fee estimator.
The fee estimator can only be run once.
6. Enter details on the fee estimate in the work notes, then select **Request Fee Approval**.
If the requester qualifies for a fee waiver, enter that information here. The fee estimate is now sent to billing to be approved. Once the fee estimate has been approved, mark the step as complete.

7. Select **Send for Requester Approval** to send the fee estimate to the requester.

This activity will automatically be marked complete once the requester has approved the fee, and the case will be moved to the Process Payment activity.

8. Verify the payment has been sent, and select **Move to Process**.

The Review stage is now complete and the case is moved to the Process stage.

Complete the Process stage in License and Permit Playbook

Complete the Process stage as your third step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Upload the documents needed to fill this request by selecting **New Document** or **Link Document**.
2. Move to the next activity by selecting **Prepare for Review**.
3. Enter any additional work notes or details needed for legal review, and then select **Send for Legal Review**.
A case task is now created and assigned to the Legal Review assignment group for approval. If the uploaded documents are rejected during the legal review, you may need to make changes and request a review again or move the case directly to the Decision stage.
4. After the legal review is complete, select **Mark as Complete**.
The case is moved to the Final Review Pre-release activity, where the documents and details of the request are reviewed by the Final Review Team assignment group.
5. After the documents have been approved by the Final Review Team, select **Move to Decision**.
The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in License and Permit Playbook

Complete the Decision stage as your last step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Enter any work notes for the customer or other users on the case watch-list, and then select **Release** to release the information to the requester.
2. **Optional:** If the requester has opted to be notified by mail, in the work notes, verify that the notice has been sent by mail and select **Mark as Complete**.
3. **Optional:** If the requester has opted to be notified by phone, in the work notes, verify that the notice has been sent by phone and select **Mark as Complete**.
4. Review the resolution code and resolution notes, and select **Propose solution**.
All case tasks must be closed before an agent can propose a solution to the case.

A notification is sent to the constituent that lets them know that the request is completed. The constituent can either accept or reject the proposal. If the constituent accepts the proposal, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another outcome.

Track license and permit requests by using License and Permit Playbook

Track all the license and permit requests that are assigned to you or other agents in your government agency by using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager, sn_gsm_lic_prmt.case_task_agent, sn_gsm_lic_prmt.case_task_agent, sn_gsm_lic_prmt.government_service_manager

About this task

When you select a case, a form opens with the following sections:

- A record of activity on the case, including added attachments or any interactions between the requester and the license and permit request case agent.
- Tasks or actions that need to be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including contact information, the case number, and the case's stage and status.
- Any attached files.

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. In the License and Permit Requests section, select a list that is described in the following table.

License and Permit Request Lists

List	Description
All	All license and permit request cases that the agent has access to.
My Cases	All license and permit request cases assigned to the agent.
My Open	Open cases assigned to the license and permit request case agent.
Unassigned for my group	Cases that belong to any of the license and permit request case agent's groups but haven't been assigned to an agent.

Create a License and Permit request on behalf of a constituent or business

Government service agents can create requests on behalf of constituents or business from the Government Service Portal. Constituents can also create and submit license/permit requests on behalf of someone else through the Government Service Portal.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > License & Permit Requests > All**.
2. Select **New** to create a case.
3. Select **General License/Permit** under the Service dropdown, and **New License/Permit Request** under the Case Type dropdown.
4. Select **Create Case**.
The License and Permit Playbook opens and initiates the first activity for collecting the request details.
5. On the Enter Application Details activity card, confirm the applicant's eligibility and select **Continue**.
6. On the form, fill in the fields with the requester's contact information and details of the request.
7. Under Representation, select the checkbox for **Requesting on behalf of someone else**.
8. Enter the name of the constituent or business that the requester is submitting the application on behalf of, and select **Save**.

i Note:

All license/permit co-applicants must have a business contact account associated with your business to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see [Create a business contact account from license or permit application data](#).

9. **Optional:** Select any add-ons, such as permit endorsements.
You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.
10. Review the fees associated with the requester's choices.
The fee total changes dynamically based on the options selected. If the constituent or requester is fee exempt, select the **Fee Waiver** checkbox and enter a justification to claim an exemption for them.
11. Select **Submit** to move to the next activity.
12. Add any additional related parties.
Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered on the Government Service Portal and associated with your business.
13. Select **Mark Complete**.

Result

A case is created with the license or permit request information and all related parties, and is now routed to the constituent via the Government Service Portal, where they can upload any applicable identity documents, credentials, or supporting documentation required for this license/permit request. The case continues once the constituent has uploaded these documents.

Using the contextual side panel in Public Sector Digital Services License and Permit Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CSM Configurable Workspace gives you access to information that can help you resolve license and permit request cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the License and Permit Playbook.

Contextual side panel tabs

Field	Description
Record information icon 	Relevant information about a record. In License and Permit Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing the ribbon information in License and Permit Playbook .
Activity stream icon 	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.
Attachments icon ()	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Dynamic Related Records icon ()	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Email template icon ()	Reusable content for the subject line and message body of email notifications.
Template icon ()	Standard content that is related to resolving the issue. To create a template, select the template icon  .

Use response templates in License and Permit Playbook

Respond to cases by using the response templates in the contextual side panel in CSM Configurable Workspace. Good templates save you time by eliminating repetitive work. Response templates replace the static text with details from the license/permit application.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager, sn_gsm.case_task_agent

About this task

Selecting the response templates icon  shows the reusable messages that you can copy and paste into cases and case tasks.

In License and Permit Playbook, Response Templates replace the static text with details from the license/permit application, such as:

- Constituent or Business Contact Name
- License/permit application Number
- License/permit application submission date
- Short description
- Address Information
- Assigned to

For information on how to create response templates, see [Create or modify a response template](#) .

Procedure

1. In the CSM Configurable Workspace, open an information request task.
2. In the contextual side panel, select the response templates icon  to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in License and Permit Playbook

You can access the activity stream in the contextual side panel in CSM Configurable Workspace after you create an license and permit request record using the License and Permit Playbook. The activity stream enables you to communicate with requesters and make internal notes about the work that is done on a record, making it easier to relay and track information.

Using the activity stream

You can use an activity stream to communicate with requesters and track information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon () in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. At the top of the activity stream, select Case or Task to switch views.

Agent tasks (continued)

Task	Description
Add work notes or comments	In the Compose section: 1. Select the Work notes or Comments activity. 2. Add the information to the text field. 3. Select Post Work Notes or Post Comments. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Filter or search posts	At the top of the Activity section, select the filter icon () to display the filter selections: • Post types: Select the types of posts to view, such as the work notes or attachments. • Field changes: Select the fields that you want to view the posts for in only those fields. • Flagged: Enable this button to view the posts that have been flagged as important. • Filter sets: Select two or more filters in this list. Search all activity posts by selecting the search icon ().
Sort posts	Sort the posts by the newest to the oldest or the oldest to the newest posts by selecting the sort icon ().
Expand and collapse posts	Expand and collapse posts by selecting the more options icon (): • Expand all posts: Expands the posts to view additional details. • Collapse all posts: Returns the posts to their previous state.

Viewing the dynamic related records in License and Permit Playbook

You can view the dynamic related records in the playbook contextual side panel in CSM Configurable Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in License and Permit Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create an license and permit request record.

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Different related records appear based on each playbook stage and step. At the Intake and Review stages, the agent should see similar Closed License/Permit Requests, so they can compare the outcome of similar requests. At the Process and Decision stages, agents should see any Open Case Tasks that are preventing the case from moving to the next step, or being resolved and closed.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- SLAs
- Escalations
- Blocked By
- Open Case Tasks
- Similar License/Permit Requests
- Emails
- Draft Emails
- Documents
- Approvals
- Knowledge Gaps
- Install Base
- Attached Knowledge
- Requests
- Interactions
- Related Cases
- Special Handling Notes
- Appointments
- Related Parties

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon () that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. For more information, see Customize the related records view in Service Request Playbook .
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customize the related records view in Service Request Playbook .
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon () to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in License and Permit Playbook

You can view the information about the ribbon in the contextual side panel in CSM Configurable Workspace. The ribbon displays the important information about the case, such as the information request record information, constituent contact details, and the case timeline.

Select the record information icon () in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Case record number, short description, stage, state.
Requester Overview Card	Details about the constituent and contact for the case.

Contextual Side Panel Ribbon fields (continued)

Field	Definition
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the constituent/business. You can also see how much time that the agent and user spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Add Multiple Parties to a record in License and Permit Playbook

As a government agent, you can add other business contacts or constituents to a license or permit application.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. Open the License or Permit Request case you wish to add multiple related parties to.

Note:

Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of License and Permit Playbook.
5. Select **Add Related Party**.
6. Select the Type and Responsibility of the related party in the dropdown, then enter their contact name in the Contact field to look up existing contacts that match this name.

Note:

All license/permit co-applicants must have a business contact account to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see [Create a business contact account from license or permit application data](#).

7. Select **Save**.
8. Repeat steps 5-7 to add as many related parties as needed.
9. Select **Mark as Complete**.

Create a business contact account from license or permit application data

Use the contact information for related parties entered on a license or permit application to create new business contact accounts.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Navigate to the CSM Configurable Workspace and select **Interactions > All**.
2. Select the interaction number to open an existing interaction record, or select the new icon  to create an interaction.
3. Select the interaction type and assign the interaction to a user.
4. **Optional:** Enter a short description of the interaction.
5. Select **Save**.
6. Select **Create Business** and fill in the fields.
7. Select **Submit**.

Edit or remove a business contact or related party from a License and Permit Application

Additional business contacts can be edited or removed by a government service agent before a license or permit case reaches the Process stage.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CSM Configurable Workspace.
 2. Navigate to the **License and Permit Requests** list and select **All**.
 3. Open the License or Permit Request case you wish to remove a business contact from.
- Note:**
Related parties can only be edited if the case is in the **Intake** or **Review** stage.
4. Navigate to the **Add related parties** activity in the Intake stage of License and Permit Playbook.
 5. Select the delete icon  next to the business contact you wish to delete, or the edit icon  next to the business contact you wish to edit.
 6. Select **Save** once you are finished editing the related party information.
 7. Select **Mark Complete** to save the activity.

Using Information Request Playbook

If you're an information request case agent or manager, you can use the Information Request Playbook for Public Sector Digital Services to manage and resolve requests for information and public records.

A playbook provides you with step-by-step guidance through the life cycle of an information request case.

The Information Request Playbook automatically appears in the **Playbook** tab when you create an information request case by using the CSM Configurable Workspace.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.

When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

Playbook stages

The Information Request Playbook stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the information request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details to verify that the issue is valid and needs to be resolved.
Process	Guides you through the activities for the information request fulfillment.
Decision	Captures and communicates the documents and information to the constituent and any other agents or involved parties.

Playbook layout

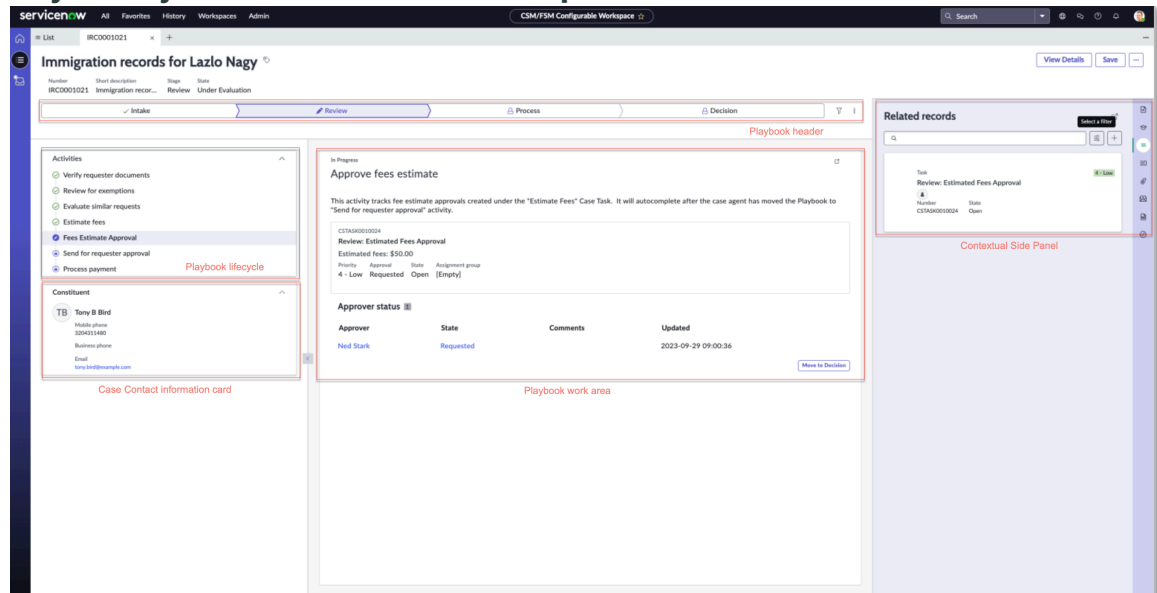
A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for the Information Request Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based experience view



The following table shows the components that you can see in the Information Request Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.

Playbook components (continued)

Playbook area	Description
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information: ◦ Case or case task activity stream. ◦ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ◦ Dynamic related records. For more information, see Dynamic related records.
Constituent or Business Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.

Create an information request record by using Information Request Playbook

Create an information request record in the Public Sector Digital Services application by using an Information Request Playbook activity. By using a playbook, you can have an efficient, streamlined way to create and resolve an information request.

Before you begin



Note:

Before you start this procedure, verify that the Information Request Playbook application, which is separate from Public Sector Digital Services Core, is installed and enabled in the CSM Configurable Workspace. For instructions, see [Install Information Request Playbook for Public Sector Digital Services](#).

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

If a playbook is configured to use a record generator, you can create a record by using a playbook activity. If a case is already associated with a playbook, a new information request case type is opened in a new tab, with Playbook as the default tab. Creating a record from a list or form, or from an activity in another playbook, opens the Information Request Playbook and initiates the first activity. This activity, the first step of the Intake stage, guides you through the record creation process.

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > Information Requests > All**.

2. Select **New**.

The Information Request Playbook opens and initiates the first activity for collecting the request details, which is the Intake stage.

3. On the Enter Request Details activity card, fill in the information.

4. Select **Save**.

A case is created with the information request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity.

Using the contextual side panel in Public Sector Digital Services Information Request Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CSM Configurable Workspace gives you access to information that can help you resolve information request cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the Information Request Playbook.

Contextual side panel tabs

Field	Description
Record information icon 	Relevant information about a record. In Service Request Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing the ribbon information in Information Request Playbook .
Agent assist icon ()	List of search results with the content that is related to the record that you are viewing. The content may include knowledge articles, recommended actions, or other records. For more information, see Agent assist Overview  .
Attachments icon ()	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Template icon ()	Standard content that is related to resolving the issue. To create a template, select the template icon  .
Response template icon ()	Reusable messages that you can copy and paste into the cases and case tasks. For more information on using and creating response templates, see Use response templates in Information Request Playbook .

Contextual side panel tabs (continued)

Field	Description
Dynamic Related Records icon (☰)	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Activity stream icon (≡)	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.

Use response templates in Information Request Playbook

Respond to cases by using the response templates in the contextual side panel in CSM Configurable Workspace. Good templates save you time by eliminating repetitive work.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

About this task

Selecting the response templates icon  shows the reusable messages that you can copy and paste into cases and case tasks. For information on how to create response templates, see [Create or modify a response template](#) .

Procedure

1. In the CSM Configurable Workspace, open an information request task.
2. In the contextual side panel, select the response templates icon  to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in Information Request Playbook

You can access the activity stream in the contextual side panel in CSM Configurable Workspace after you create an information request record using the Information Request Playbook. The activity stream enables you to communicate with requesters and make internal notes about the work that is done on a record, making it easier to relay and track information.

Using the activity stream

You can use an activity stream to communicate with requesters and track information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon (≡) in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. At the top of the activity stream, select Case or Task to switch views.
Add work notes or comments	In the Compose section: 1. Select the Work notes or Comments activity. 2. Add the information to the text field. 3. Select Post Work Notes or Post Comments. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Filter or search posts	At the top of the Activity section, select the filter icon () to display the filter selections: • Post types: Select the types of posts to view, such as the work notes or attachments. • Field changes: Select the fields that you want to view the posts for in only those fields. • Flagged: Enable this button to view the posts that have been flagged as important. • Filter sets: Select two or more filters in this list. Search all activity posts by selecting the search icon ().
Sort posts	Sort the posts by the newest to the oldest or the oldest to the newest posts by selecting the sort icon ().
Expand and collapse posts	Expand and collapse posts by selecting the more options icon ():

Agent tasks (continued)

Task	Description
	• Expand all posts: Expands the posts to view additional details. • Collapse all posts: Returns the posts to their previous state.

Viewing the dynamic related records in Information Request Playbook

You can view the dynamic related records in the playbook contextual side panel in CSM Configurable Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in Information Request Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create an information request record.

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- Similar Information Requests
- Open Case Tasks
- Related Work Orders
- Blocked Tasks
- Emails
- Approvals
- SLAs
- Escalations for the case

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon () that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. For more information, see Customize the related records view in Service Request Playbook .
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customize the related records view in Service Request Playbook .
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon () to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in Information Request Playbook

You can view the information about the ribbon in the contextual side panel in CSM Configurable Workspace. The ribbon displays the important information about the case, such as the information request record information, constituent contact details, and the case timeline.

Select the record information icon () in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Fields, case record number, short description, stage, state, and address.

Contextual Side Panel Ribbon fields (continued)

Field	Definition
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the customer. You can also see how much time that the agent and customer spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Track government information requests by using Information Request Playbook

Track all the information requests that are assigned to you or other agents in your government agency by using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

When you select a case, a form opens with the following sections:

- A conversation of the interaction between the requester and the information request case agent.
- The action that needs to be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including the case number and status.
- Any attached files.

Procedure

1. Open the Information Request Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. In the Information Requests section, select a list that is described in the following table.

Information Request Lists

List	Description
All	All information request cases that the agent has access to.
My Cases	All information request cases assigned to the agent.
My Open	Open cases assigned to the information request case agent.
Unassigned for my group	Cases that belong to any of the information request case agent's groups but haven't been assigned to an agent.

For a detailed description of the fields under each list, see [Information Request case form](#).

Resolving an information request case by using playbooks in Public Sector Digital Services

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note:

Verify that the Information Request Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see [Install and configure the Information Request Playbook application](#).

By default, the following stages are available to you as an information request case agent in the Information Request Playbook in the CSM Configurable Workspace.

- Intake
- Review
- Processing
- Decision

Stages in an Information Request Playbook

The Information Request Playbook experience starts with the Intake stage. This stage is the default playbook stage for a new information request case. Use this playbook stage to gather information about the requester, the documents being requested, and any exemption categories that the request falls into. You can also request additional information from the requester.

The playbook continues with the Review stage. In this stage, you can do the initial troubleshooting on the case, evaluate similar or duplicate requests, and determine whether the information requested can be released and if a fee needs to be charged. You can move the case to the next stage when the requester accepts the fee, or if a fee waiver is submitted and approved.

The playbook continues with the Process stage. In this stage, you can assess resources, request a fee approval, create case tasks, and add or request new information before the case resolution begins. The case status changes to Work in Progress once the fee payment is processed or waived. The case is then sent for legal review. After legal review is complete, the case is moved to the Decision stage. You may solicit additional information from the requester at any time during this stage.

The final stage of the Information Request Playbook is the Decision stage. At the Decision stage, the status of the case is updated from Review in Progress to Ready for Decision after the case has passed legal review. A notification is sent to the requester that lets them know that case approval has been obtained and the requested documents have been uploaded. The requester can then either accept or reject the document. If the requester accepts the documents, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another outcome.

Complete the Intake stage in Information Request Playbook

Complete the Intake stage as your first step in resolving a case using the Information Request Playbook.

Before you begin

Role required: `sn_gsm.constituent_agent`, `sn_gsm.relationship_agent`, `sn_gsm.government_service_manager`, `sn_gsm.business_agent`, `sn_gsm.agency_constituent_agent`, `sn_gsm.agency_manager`, `sn_gsm.agency_agent`

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > Information Requests > All**.
2. Select **New**.
The Information Request Playbook opens and initiates the first activity for collecting the request details.
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
A case is created with the information request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity. If you have enabled the Similar Request documents UI activity, this will display as the second activity. For more information, see [Configure Similar Request Documents UI in Information Request Playbook](#).
5. **Optional:** Select a related document to link it to the request, and select **Next**.
6. Review the details of the case and make updates if needed.
7. Select **Submit**.
8. Select **Assign to me**.
9. Select **Move to review**.
The Intake stage is now complete and the case is moved to the Review stage.

Complete the Review stage in Information Request Playbook

Complete the Review stage as your second step in resolving a case using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the files attached to the case, and confirm that the requester has included the required documents to validate their identity by selecting the boxes associated with the document type.
2. Select **Mark as Complete**.
3. Select any exemptions that apply to the case, and select **Mark as Complete**.
If no exemptions apply to the case, select **No exemption code(s) applicable**.
4. Do one of the following actions depending on whether you have similar or linked completed requests.
5. Estimate the fees associated with this request by using the fee estimator.
The fee estimator can only be run once.
6. Enter details on the fee estimate in the work notes, then select **Request Fee Approval**.
If the requester qualifies for a fee waiver, enter that information here. The fee estimate is now sent to billing to be approved. Once the fee estimate has been approved, mark the step as complete.
7. Select **Send for Requester Approval** to send the fee estimate to the requester.

This activity will automatically be marked complete once the requester has approved the fee, and the case will be moved to the Process Payment activity.

8. Verify the payment has been sent, and select **Move to Process.**

The Review stage is now complete and the case is moved to the Process stage.

Complete the Process stage in Information Request Playbook

Complete the Process stage as your third step in resolving a case using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Upload the documents needed to fill this request by selecting **New Document or **Link Document**.**

2. Move to the next activity by selecting **Prepare for Review.**

3. Enter any additional work notes or details needed for legal review, and then select **Send for Legal Review.**

A case task is now created and assigned to the Legal Review assignment group for approval. If the uploaded documents are rejected during the legal review, you may need to make changes and request a review again or move the case directly to the Decision stage.

4. After the legal review is complete, select **Mark as Complete.**

The case is moved to the Final Review Pre-release activity, where the documents and details of the request are reviewed by the Final Review Team assignment group.

5. After the documents have been approved by the Final Review Team, select **Move to Decision.**
The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in Information Request Playbook

Complete the Decision stage as your last step in resolving a case using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Enter any work notes for the customer or other users on the case watch-list, and then select **Release to release the information to the requester.**

2. Optional: If the requester has opted to be notified by mail, in the work notes, verify that the notice has been sent by mail and select **Mark as Complete**.

3. Optional: If the requester has opted to be notified by phone, in the work notes, verify that the notice has been sent by phone and select **Mark as Complete**.

4. Review the resolution code and resolution notes, and select **Propose solution.**

All case tasks must be closed before an agent can propose a solution to the case.

A notification is sent to the constituent that lets them know that the request is completed. The constituent can either accept or reject the proposal. If the constituent accepts the proposal, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another outcome.

Redact data from documents

As a legal reviewer, you can redact sensitive data from PDF documents by either searching keywords or selecting text in Information Request Playbook.

About this task

Agents can:

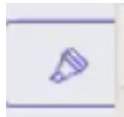
- Redact manually by selecting text to be highlighted for redaction.
- Redact via keyword using Search and Redact.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Open the Information Request Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. Select the case that contains the PDF you wish to redact information from.
4. Navigate to the **Legal Review** activity in the **Process** stage.
5. Under the Related Documents card, select the PDF you wish to redact information from.



6. Select the Redact PDF icon.
7. To redact using the highlight functionality: select **Highlight**.
8. Drag the cursor to form a box over the text you wish to redact.
A green box will display over the selected text.
9. Select **Apply Redactions** to redact the highlighted text.
10. Confirm your selection when prompted.
11. To redact using the Search and Redact functionality: enter a keyword you wish to redact, and select **Search** to parse the document for this keyword.
12. Select **Apply Redactions** to redact every instance of this keyword.
13. Confirm your selection when prompted.
14. Repeat steps 13-14 to redact multiple keywords.
15. Select **Save Changes** to save the redacted version of the PDF.
Previous versions of the document (which may contain different redacted text) are available and can be accessed by a government employee.

Result

The information is now permanently redacted from the PDF.

Add Multiple Parties to a record in Information Request Playbook

As a government agent, you can add other business contacts or constituents to an information request application.

Before you begin

Role required: admin

Procedure

1. Open the Information Request Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. Open the Information Request case you wish to add multiple related parties to.

Note:

Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of Information Request Playbook.
5. Select **Add Related Party**.
6. Select the Type and Responsibility of the related party in the dropdown, then enter their contact name in the Contact field to look up existing contacts that match this name.

Note:

All information request co-applicants must be registered on the Government Service Portal to be included on a information request application. Each co-applicant can create an account by registering on the Government Service Portal, or a government service agent can create a business contact account for them. For information on how agents can create a business contact record from information entered in an Information Request application, see [Create a business record in CSM Configurable Workspace](#).

7. Select **Save**.
8. Repeat steps 5-7 to add as many related parties as needed.
9. Select **Mark as Complete**.

Using Service Request Playbooks

If you're a government service agent or manager, you can use the Service Request Playbook for Public Sector Digital Services to manage and resolve requests for services like park maintenance, broken stop signs, or other types of community issues.

A playbook provides a step-by-step guidance through the life cycle of a government service case.

The Service Request Playbook automatically appears in the **Playbook** tab when you open or create a service request case in the CSM Configurable Workspace.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a constituent when a stage or activity is complete, or auto-sending a work order to a field service agent. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows that are associated with a specific type of case and the activities that need to be completed to resolve this type of case are detailed in the playbook. Playbooks also help you to visualize the entire lifecycle of the service request workflows by displaying your progress through the playbook in the header.

Playbook stages

The Service Request Playbook has four stages, listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the service request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details to verify that the issue is valid and needs to be resolved.
Process	Guides you through the activities for case resolution.
Decision	Captures and communicates the decision that you made on the service request to the constituent and any other agents or involved parties.

Playbook layout

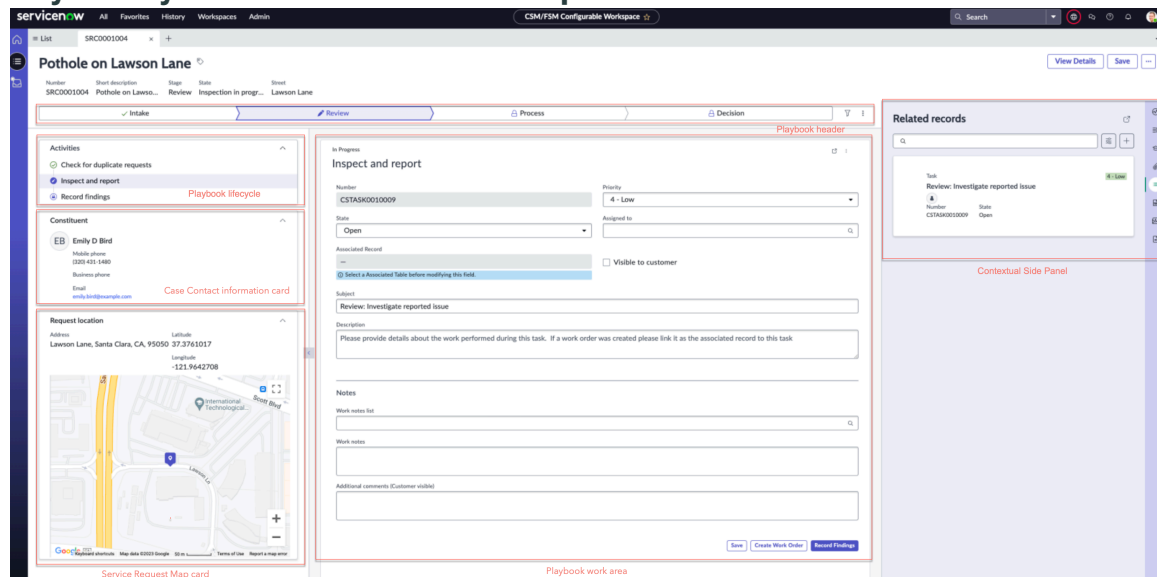
A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for the Service Request Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based experience view



The following table shows the components that you can see in the Service Request Playbook process-based workspace.

Playbook components

Playbook area	Description
Playbook header	- Appears at the top of the playbook. - Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. - Includes a filter that you can use to filter the activities by the assigned user or the activity status. - Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	- Appears in a panel on the left side of the playbook. - Displays a list of the activities for each stage. - With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	- Appears in the middle of the playbook. - Displays the card for the current activity.
Contextual side panel	- Appears on the right side of the playbook. - Includes the tabs that you can use to display the following types of information:

Playbook components (continued)

Playbook area	Description
	- Case or case task activity stream. - Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). - Dynamic related records. For more information, see Dynamic related records.
Constituent or Business Card	- Contact information for the constituent or business that submitted the request. - Appears in a panel on the left side of the playbook.
Service Request Map Card	- New component of the process-based playbook layout. - Appears after the intake stage, if the sn-geo-map plugin is installed, and Google API key is configured.

Create a service request record by using playbooks in Public Sector Digital Services

Create a service request record in the Public Sector Digital Services application by using a Service Request Playbook activity. By using a playbook, you can have an efficient, streamlined way to create and resolve a service request.

Before you begin**Note:**

Before starting this procedure, verify that the Service Request Playbook application, which is separate from Public Sector Digital Services Core, has been installed and enabled in the CSM Configurable Workspace. For instructions, see [Install Service Request Playbook for Public Sector Digital Services](#).

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

If a playbook is configured to use the record generator feature, you can create a record using a playbook activity. If a case is already associated with a playbook, a new service request case type is opened in a new tab, with Playbook as the default tab. Creating a record from a list or form, or from an activity in another playbook, opens the Service Request playbook and initiates the first activity. This activity, the first step of the intake stage, guides you through the record creation process.

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > Service Requests > All**.

2. Select **New**.

The Service Request Playbook opens and initiates the first activity for collecting the request details, which is the Intake stage.

3. On each activity card, fill in the information.

Select Skip to bypass an intake activity.

4. Select **Save**.

A case is created with the service request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity.

What to do next

Continue using the playbook stages and activities to resolve the constituent's issue and complete the case.

Resolving a service request case by using playbooks in Public Sector Digital Services

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

i Note:

Verify that the Service Request Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see [Install and configure the Service Request Playbook application](#).

By default, the following stages are available to you as a government service agent in the Service Request Playbook in the CSM Configurable Workspace.

- Intake
- Review
- Processing
- Decision

Stages in a Service Request Playbook

The Service Request Playbook experience starts with the Intake stage. This stage is the default playbook stage for a new service request case. Use this playbook stage to gather information about the requester and the complaint for the service request case. You can also request additional information from the requester.

The playbook continues with the Review stage. In this stage, you can do the initial troubleshooting on the case, check for similar or duplicate case requests, and determine what services need to be rendered and if a field service agent needs to be dispatched. For more information on the Public Sector Digital Services integration with Field Service Management, see [Integration with Field Service Management](#).

The playbook continues with the Process stage. In this stage, you can assess resources, request resource approval, create case tasks, and add or request new information before case resolution begins. If a field service agent needs to be dispatched to the service request location, you can create a work order during the process stage. The case status changes to Work in Progress after the field service agent begins work on the service request case. After work has been completed, the case is moved to the Decision stage.

The final stage of the Service Request Playbook is the Decision stage. At the Decision stage, the state of the case is updated from Work in Progress to Ready for Decision after an agent sends in a decision. A notification is sent to the requester that lets them know that a decision has been reached. The requester can then either accept or reject the solution. If the requester accepts the solution, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another solution.

Complete the Intake Stage in Service Request Playbook

Complete the intake stage as your first step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists > Service Request case list > All**.
2. Select **New**.
The Service Request playbook opens and initiates the first activity for collecting the request details
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
A case is created with the service request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity. If you have enabled the Similar Records UI activity, this will display as the second activity. For more information, see [Configure the Similar Records Activity UI in Service Request Playbook](#).
5. Review the similar records that are displayed in the Similar Records Activity UI, and determine whether any of them are a duplicate of the current case.
 - If the current case is a duplicate of any of the cases displayed in the Similar Records UI, select **Mark as Primary Case**, then select **Move to Decision**.
 - If the current case is not a duplicate of any of the cases displayed in the Similar Records UI, select **Existing Case Check Done** to move to the next activity.
6. Review the details of the case and make updates if needed.
7. Select **Submit**.
8. Select **Move to review**.
The Intake stage is now complete and the case is moved to the Review stage.

Complete the Review Stage in Service Request Playbook

Complete the review stage as your second step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. In the contextual side panel, check for duplicate cases using the Related records feature in the contextual side panel.
2. Do one of the following actions depending on whether or not you have duplicate cases.
3. Fill in the Inspect and report case form.
For more information on how Public Sector Digital Services integrates with Field Service Management, see [Integration with Field Service Management](#).

4. Do one of the following actions depending on whether a field service agent must be dispatched to the service request location.
5. Fill in the Record findings case form.
6. Verify if any open case tasks need to be closed, and then select **Move to process**.
The Review stage is now complete and the case is moved to the Process stage.

Complete the Process Stage in Service Request Playbook

Complete the process stage as your third step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Fill in the Assess resources case form.
2. Do one of the following actions depending on whether a resource approval is required to proceed.
3. Fill in the Perform work case form.
4. Do one of the following actions depending on whether a field service agent must be dispatched to the service request location.
5. Verify that everything is correct and that you've added all your comments.
6. Select **Move to decision**, and confirm again when prompted.
The Process Stage is complete and the case is moved to the Decision stage.

Complete the Decision Stage in Service Request Playbook

Complete the decision stage as your last step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Fill in the Resolve case form.
2. Select **Propose solution**.
All case tasks must be closed before an agent can propose a solution to the case.
A notification is sent to the constituent that lets them know that a decision has been reached.
The constituent can either accept or reject the solution. If the constituent accepts the solution, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another solution.

Using the contextual side panel in Public Sector Digital Services Service Request Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CSM Configurable Workspace gives you access to information that can help you resolve government service cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the Service Request Playbook.

Contextual side panel tabs

Field	Description
Record information icon 	Relevant information about a record. In Service Request Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing the ribbon information in Service Request Playbook .
Agent assist icon ()	List of search results with the content that is related to the record that you are viewing. The content may include knowledge articles, recommended actions, or other records. For more information, see Agent assist Overview  .
Attachments icon ()	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Template icon ()	Standard content that is related to resolving the issue. To create a template, select the template icon Create .
Response template icon ()	Reusable messages that you can copy and paste into the cases and case tasks. For more information on using and creating response templates, see Use response templates in Service Request Playbook .
Dynamic Related Records icon ()	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Activity stream icon 	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.

Use response templates in Service Request Playbook

Respond to cases by using the response templates in the contextual side panel in CSM Configurable Workspace. Good templates save you time by eliminating repetitive work.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

About this task

Selecting the response templates icon  shows the reusable messages that you can copy and paste into cases and case tasks. For information on how to create response templates, see [Create or modify a response template](#) .

Procedure

1. In the CSM Configurable Workspace, open a service request task.
2. In the contextual side panel, select the response templates icon  to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in Service Request Playbook

You can access the activity stream in the contextual side panel in CSM Configurable Workspace after you create a service request record. The activity stream enables you to communicate with constituents and make internal notes about the work that is done on a record, making it easier to relay and track the information.

Using the activity stream

You can use an activity stream to communicate with constituents and track the information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon () in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. Select Case or Task at the top of the activity stream to switch views.
Add work notes or comments	In the Compose section: 1. Select the Work notes or Comments activity. 2. Add the information to the text field. 3. Select Post Work Notes or Post Comments.

Agent tasks (continued)

Task	Description
	The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Filter or search posts	Select the filter icon () at the top of the Activity section to display the filter selections: • Post types: Select the types of posts to view, such as the work notes or attachments. • Field changes: Select the fields that you want to view the posts for in only those fields. • Flagged: Enable this button to view the posts that have been flagged as important. • Filter sets: Select two or more filters in this list. Select the search icon () to search all activity posts.
Sort posts	Select the sort icon () to sort the posts by the newest to the oldest or the oldest to the newest posts.
Expand and collapse posts	Select the more options icon () to expand and collapse posts: • Expand all posts: Expands the posts to view additional details. • Collapse all posts: Returns the posts to their previous state.

Viewing the dynamic related records in Service Request Playbook

You can view the dynamic related records in the playbook contextual side panel in CSM Configurable Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in Service Request Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create a service request record. For details on how to create a record, see [Create a service request record using playbooks in Public Sector Digital Services](#).

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- Similar Service Requests
- Open Case Tasks
- Related Work Orders
- Blocked Tasks
- Emails
- Approvals
- SLAs
- Escalations for the case or customer

Default related records

The following table shows the default related records that are based on each playbook step.

Default related records

Stage	Playbook Activity	Default related record
Intake	All activities	Similar Service Requests
Review	Check similar requests	Similar Service Requests
Review	• Inspect and report • Record findings	Open Case Tasks
Process	• Assess resources • Perform work	Open Case Tasks
Process	Approve resources	Approvals
Decision	All activities	Open Case Tasks

You can search the Related Records list by entering the text in the search field or by filtering the list to display the records of a specific type. You can expand a card to show a more detailed view or open the list in a subtab. If you have the create permission, you can also create new related records of the selected type.

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon () that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. For more information, see Customize the related records view in Service Request Playbook.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customize the related records view in Service Request Playbook.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon () to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in Service Request Playbook

You can view the information about the ribbon in the contextual side panel in CSM Configurable Workspace. The ribbon displays the important information about the case, such as the service record information, constituent contact details, and the case timeline.

Select the record information icon () in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Fields, case record number, short description, stage, state, and address.
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the customer. You can also see how much time that the agent and customer spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Customize the related records view in Service Request Playbook

You can customize the related records view in Service Request Playbook.

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon () that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. 1. Select the filter icon (. 2. Select a record type from the menu. The menu includes the related lists that have been configured for the parent record.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. 1. In the search field at the top of the Related Records list, enter the search text. 2. Select the search icon (.

Customizing the Related records view (continued)

Task	Description
	Note: The search field is grayed out if search is not available for the selected type of related records.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform available actions.
Open the related record list in a list view in a subtab	Display the related records in a list view in a subtab under the parent record by selecting the subtab icon ().
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record. 1. Select the create record icon () at the top of the Related Records list. 2. Fill in the fields on the record form and select Save.

Track government service requests by using Service Request Playbook

Track all the service requests that are assigned to you or other agents in your government agency by using the Service Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

When you select a case, a form opens with the following sections:

- A conversation of the interaction between the user and the government service agent.
- The action that needs to be taken on the user's part, such as accepting or rejecting a solution.
- The case details, including the case number and status.
- Any attached files.

Procedure

1. Open the Service Request Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **Service Requests** list and click **All**.
3. In the Service Requests section, select a list that is described in the following table:

Service Request Lists

List	Description
All	All service request cases that the agent has access to.

List	Description
My Cases	All service request cases that are assigned to the agent.
My Open	Open cases that are assigned to the government service agent.
Unassigned for my group	Cases that belong to any of the government service agent's groups but haven't been assigned to an agent.

You can see the following fields under each list:

- Number
- Short description
- Action status
- Service
- Constituent
- Business
- Business contact
- State
- Address type
- Reported on
- Assigned to agency
- Assigned to

For a detailed description of these fields, see [Government Service Case form](#).

Life cycle of a Public Service case

A public service request case within one of the three Public Sector Digital Services playbook applications can be in one of several states as it progresses through the fulfillment cycle.

Public Service request case stages

A public service request case has four stages:

- Intake
- Review
- Process
- Decision

As a public service request case moves through the stages listed above and toward a resolution, the case status is updated. Stage and status are related to each other as described in the following table.

Public service request case stages and status

Case Stage	Case Status	Description
	Draft	The case has not yet been submitted, and the public service request case record has not yet been created.
Intake	New	The initial status for a new public service case created through the Government Service Portal

Public service request case stages and status (continued)

Case Stage	Case Status	Description
Guides the agent to collect the information needed to create the public service request case.		or one of the Public Sector Digital Services playbooks. In this state, a government service agent can do one of the following: • Assign to me: Assign themselves the case. The state changes to Open. • Accept: If the case was assigned to the agent by a government service manager, the agent can accept or re-assign the case. If accepted, the state changes to Open. • Update: Update the case. • Close Case: Close the case. • Delete: Delete the case. In this state, a constituent can do either of the following: • Update: Update the case with additional information. • Close Case: Close the case.
	Open	A case changes from New to Open when a government service agent assigns the case to themselves (Assign to me), or accepts a case assigned to them by a government service manager. In this state, the agent can do one of the following: • Update: Update the case. • Request Info: Request additional information from the constituent. The case state changes to Awaiting Info. • Propose Solution: Propose a solution for the case. The case state changes to Resolved. • Close Case: Close the case. • Delete: Delete the case.
	Awaiting Info	Additional information has been requested from the constituent. In this state, the constituent can do one of the following: • Update: Add the requested information to the case. Once that information has been received, the case moves back to Open. • Close Case: Close the case.

Public service request case stages and status (continued)

Case Stage	Case Status	Description
Review Enables the agent to do initial troubleshooting on the case, check for similar or duplicate case requests, and determine what services need to be rendered.	Open	In this state, the agent can do one of the following: • Check to see if there are similar or duplicate requests. If so, the case can be moved to progress directly. • Request an Inspection: If an inspection is requested, the case status moves to Inspection in Progress
	Inspection in Progress	Inspection of the service location by a field service agent is in progress. Once complete, the case is moved to Process .
	Awaiting Info	If an agent requests more information at any time during the Review stage, the status of the case changes to Awaiting Info . In this state, the agent can do one of the following: • Open Case: Change the case state back to Open. • Update: Update the case. • Close Case: Close the case. • Delete: Delete the case. In this state, the constituent can do one of the following: • Update: Add the requested information to the case. Once the constituent updates the case, the state changes to Open. • Close Case: Close the case.
Process	Work in Progress	The case status changes to Work in Progress when the agent selects Start Work . A work order is now in progress to solve the public service request.
	Work Assignment in Progress	A work order is in progress, and the government service agent resolves any open case tasks associated with the case.
	Awaiting Info	The case moves to the Awaiting Info state when an agent selects Request Info to request more information from the requester. The agent has requested more information during or after work has been done to resolve the case.
Decision	Ready for Decision	The case is ready for an agent decision.

Public service request case stages and status (continued)

Case Stage	Case Status	Description
Allows the requester to review the agent's decision and either accept or reject.		
	Resolved	Once an agent provides a resolution code, enters resolution notes in the Resolution Information tab, and selects Propose Solution, the case state changes from Awaiting Info to Resolved. The Resolution code and Resolution notes fields are mandatory for an agent to propose a solution to the case. In this state, the agent can do one of the following: • Update: Update the case • Close Case: Close the case. A case cannot be closed by an agent or agent manager when it is in this state. In this state, the constituent can do one of the following: • Accept Solution: Accept the solution proposed by the agent. The case state changes to Closed and a survey is displayed. • Reject Solution: Reject the solution proposed by the agent. The case state changes to Open. • Delete: Delete the case.
	Closed	After proposing a solution, the agent waits for a constituent response. • If the constituent clicks Accept Solution, the case state changes from Resolved to Closed. • If the constituent clicks Reject Solution, the state changes from Resolved to Open, and the agent must propose another solution. Closing a case as an agent or agent manager requires comments to be added to the Resolution notes field. This is not required when a customer closes a case. A case cannot be updated once it is closed.
	Cancelled	The public service request is cancelled.

Note:

You can't edit a public service request case when the state of the case is set to **Closed** **complete** or **Canceled**.

Using the CSM Configurable Workspace for Public Sector Digital Services

Set up CSM Configurable Workspace for your agents and expand the Workspace UI so they can engage with customers, answer questions, create cases, and resolve issues.

Government service agents can complete most tasks in CSM Configurable Workspace. For more information on how to set up the CSM Configurable Workspace, see [Set up the CSM Configurable Workspace for Public Sector Digital Services](#).

The tables below describe some of the basic tasks that agents can perform in CSM Configurable Workspace.

Agent tasks

Task	Description	Details
Use playbooks	Use the step-by-step guidance provided by playbooks to complete tasks and resolve cases.	Using Playbooks
Create a specific type of case	Create a case for a specific type of constituent request.	Creating and resolving case tasks
Use Knowledge to assist with cases	Search for knowledge articles and attach them to cases or open articles in sub-tabs for easier reading. Report a knowledge gap if you can't find relevant articles and, if permission is enabled, create articles directly from cases.	Search for knowledge articles  Open a knowledge article  Report a knowledge gap  Create a knowledge article 
Use response templates	Quickly respond to customers using different types of predefined information.	Use response templates in Service Request Playbook

Creating and resolving case tasks as a government service agent in CSM Configurable Workspace

Service request case tasks in Public Sector Digital Services are automatically created and assigned to agents as each service request case moves through its life cycle. Government service agents can view and complete these case tasks (or even create their own tasks) in the CSM Configurable Workspace.

View existing service request case tasks in CSM Configurable Workspace

View a list of the case tasks that are associated with a service request case, regardless of whether the case task was created automatically or manually, in the CSM Configurable Workspace.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

Procedure

1. From the Lists menu in the CSM Configurable Workspace sidebar, navigate to **Service Requests > All**.
2. Open the service request case by selecting the case number.
3. In the Related List header, open the Tasks related list by selecting **Case Tasks**.
All the tasks that are associated with this service request case are displayed.

What to do next

To view a list of every service request case task that has been assigned to an agent in your agency, navigate to **Lists > Government Service Case Tasks > All**.

Create a service request case task in CSM Configurable Workspace

Manually create case tasks from information that you gathered from a service request case in CSM Configurable Workspace.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When an agent creates a service request case task, the system uses information from the service request case to automatically fill in the fields on the Case Task form. Agents can use auto-filled information, as well as the data collected from the end user, to create service request case tasks. After the agent creates and saves a case task, it appears in the Case Tasks related list on the Service Request Case form.

Procedure

1. Open the case.
2. From the Case Tasks related list, select **New**.
3. On the form, fill in the fields.
For more information on the fields, see [Service Request Case Task form](#).
4. Select **Save**.

Resolve a service request case task in CSM Configurable Workspace

Resolve a service request case in CSM Configurable Workspace. After all information has been added to the comments or work notes of a service request case task, you can mark the case task as resolved.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

Procedure

1. Navigate to the Lists menu in the CSM Configurable Workspace sidebar.
2. From the Lists menu in CSM Configurable Workspace, navigate to **Service Requests > All**.
3. Open the service request case by selecting the case number.
4. From the Tasks related list, select the task number.
5. Add any additional work notes or comments.
The case task can't be resolved without added work notes or comments.
6. Select **Save**.
7. Select **Close**.

Create a business record in CSM Configurable Workspace

If you're a government service agent, create a business record in CSM Configurable Workspace directly from a service request, interaction, or case when an incident is reported by a constituent, business, or business contact.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

Procedure

1. Navigate to the CSM Configurable Workspace and select **Interactions > All**.
2. Select the interaction number to open an existing interaction record, or select the new icon  to create an interaction.
3. Select the interaction type and assign the interaction to a user.
4. **Optional:** Enter a short description of the interaction.
5. Select **Save**.
6. Select **Create Business** and fill in the fields.
For more information on the fields, see [Business Profile form](#).
7. Select **Submit**.
The business is now linked to the interaction, and a new tab opens with the business details.

Using the Business Location Service Portal in Public Sector Digital Services

You can use the Business (Agency) Location Service Portal (BLSP), available with the Public Sector Digital Services application, as a one-stop shop to manage internal and external agency locations.

As a user with the sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, or admin role, you can use the Business (Agency) Location Service Portal page to:

- Get a 360° view of an agency location.
- Add and manage agency members.
- Submit cases against agency locations, or public services at a service organization.
- Access Knowledge Base articles and engage with the community.

From the Business Location Service Portal, you can access and use the following features:

Business Location Service Portal

UI component	Description
Support	Click Support to create a customer case.
Knowledge	Clicking Knowledge on the header takes you to the kb_home page. You can search the Knowledge Base or view a list of top-rated or most viewed Knowledge Base articles.
Cases	View the list of cases.
Your Information	Navigate to agency locations, services received, and install base items.
Profile menu	Click your profile photo to either view your profile or log out.
Search	Enables you to search support articles and requests. Enter a search term and click Search to view the search results.
Browse Services	Click Browse Services to report an issue or request a service. Use the service to register a member at an external agency location.
View Articles	Explore the knowledge base to get the information.
Ask the community	Provides access to the Community homepage. You can use the community to ask questions and get answers, connect with people who share similar expertise, and join forums and participate in discussions.
Agency Locations	Get the 360° view of the agency location. Use the feature to: • Add a member to an agency location. • Report cases on behalf of an agency location. • Report cases against services received from a specific agency location. • Report cases against public services offered at a particular agency location.
Featured Articles	View featured community content.
Most Viewed articles	View a list of the most viewed articles.

Depending on the configuration set by your administrator, you can perform the following tasks from the Agency Location Service Portal:

- Register and assign staff members to an agency location
- Report cases on behalf of an agency location
- Report cases against services received from a specific agency location

- Report cases against public services offered at a particular agency location
- Access knowledge base articles and frequently asked questions

Using Virtual Agent for Public Sector Digital Services

As an admin, you can use Virtual Agent to create chatbot conversations tailored to public sector use cases.

With Virtual Agent for Public Sector Digital Services, which is available by subscription, you can build conversation topics that assist your constituents with self-service tasks. For example, you can create Virtual Agent topics that enable constituents to submit government service cases or help them find relevant information on government regulations or benefits.

As admins or topic authors, you can build your own custom, public sector conversation topics. Or, you can use pre-built conversations that are available with the Virtual Agent platform and Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) and modify them for public sector use cases.

When you're creating or modifying topics, you can also use pre-built components called topic blocks. These blocks are subflows that run conversational elements or common tasks in a conversation, such as adding or retrieving records. Pre-built topic blocks are included with the Virtual Agent platform and Customer Service conversations. Topic blocks enable topic authors to quickly add standard functions to Virtual Agent conversations, simplifying conversation design and maintenance.

The Public Sector Digital Services Core application provides several topic blocks that you can use in public sector conversations:

- Prompt Service for Constituent – Asks constituents to select a type of government service.
- Create Public Sector Additional Members – Prompts constituents to add other persons who have an authorized interest in an issue or case.

To learn more about topic blocks and how to use them in Virtual Agent conversations, see [Maximizing code reuse with topic blocks](#).

Before building Virtual Agent topics for public sector use cases

Before creating Virtual Agent conversations, review the following prerequisites and the basic process for working with pre-built topics and topic blocks in Virtual Agent Designer.

- [Activate the Customer Service Virtual Agent Conversations plugin](#) (com.sn_csm.virtualagent) to access pre-built Customer Service conversations and topic blocks.
- Determine the public sector use cases for topics to be created.
- In Virtual Agent Designer:
 - [Preview \(test\) pre-built topics and topic blocks](#), such as the public sector blocks, to see how they work. Use the **Type** filter to sort the list of items, such as topic blocks, in the Topics page.
 - If you want to use a pre-built topic or topic block, [duplicate](#) and [publish](#) it.
 - Add the appropriate copies of topic blocks, such as the public sector topic blocks, to the originating (calling) topic. To learn more about adding topic blocks to a conversation, see [Add a reusable topic block to a calling topic or topic block](#).

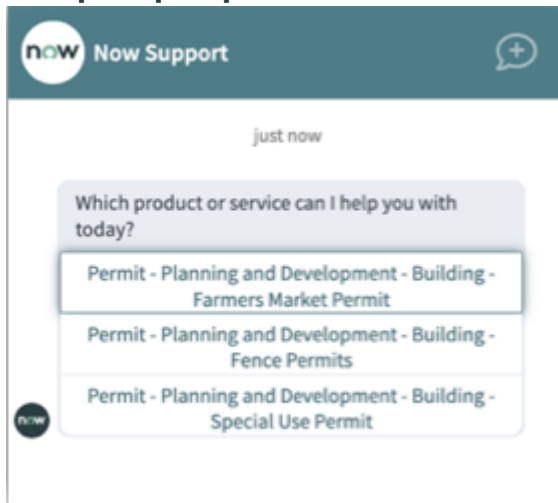
Note:

You can use both public sector topic blocks in a conversation.

Prompt Service for Constituent topic block

Use this topic block in a conversation to ask constituents to select a service from a list of available government services, for example permits or licenses. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

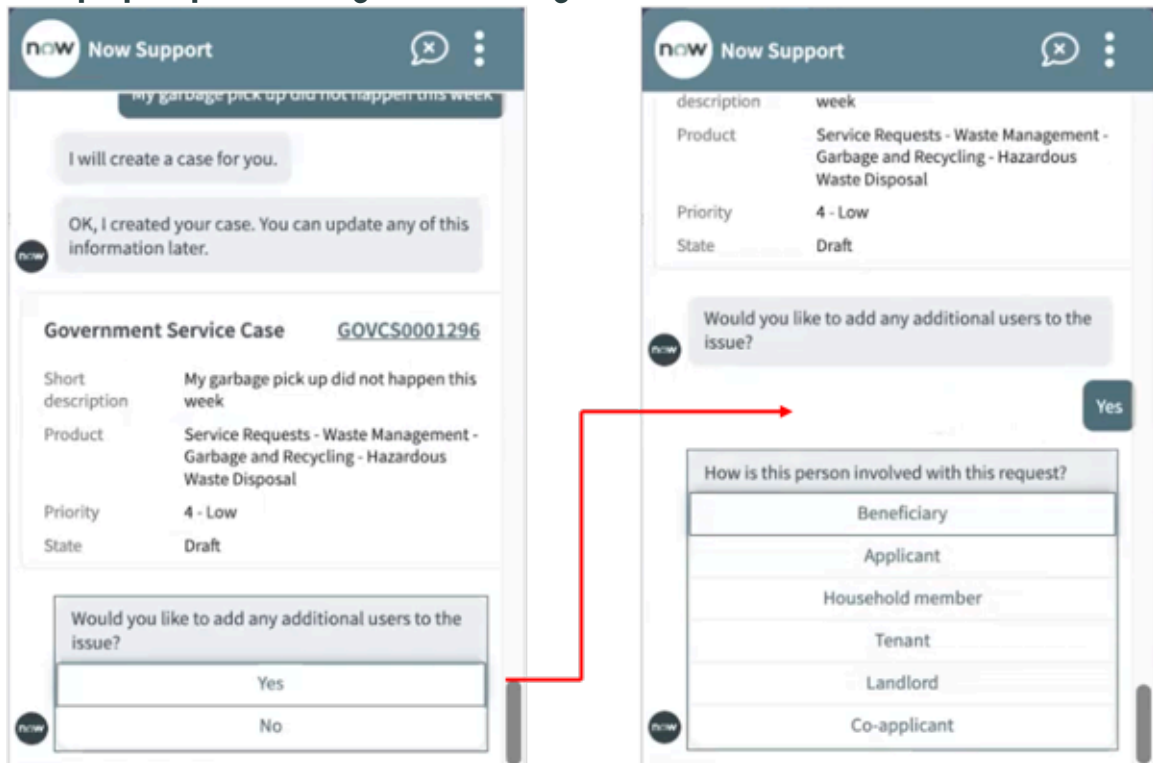
Example of prompt for services



Create Public Sector Additional Members topic block

Use this topic block to let your constituents specify other people, such as family members or other authorized individuals, who can view a case or issue. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

Example prompts for adding members to a government service case



When you use this topic block in a conversation, you specify the input parameters from the originating (calling) topic to the topic block.

Public Sector Additional Members input parameters

Parameter	Description
case_id	sys_id of the public sector case record created.
case_type	Extension of the base public sector service.

Mobile Agent experience for Public Sector Digital Services

If you're a government agent, you can use the Mobile Agent app on your mobile device to create, update, and monitor the status of non-emergency service requests in the Public Sector Digital Services application. You can also get an overview of your case load, including your new and active cases.

Use the Mobile Agent to review your case details and complete your case tasks. With a government service agent role, you can use the app to do the following tasks:

- Get a quick overview of your case load.
- Add comments or work notes to cases.
- Review your case details, activity stream, and related information, such as the service level agreements (SLAs), case tasks, and related cases.
- Edit case information.
- Complete case tasks.

The following video highlights some of the capabilities of the ServiceNow® Mobile Agent app. Introduction to ServiceNow mobile apps.

Note:

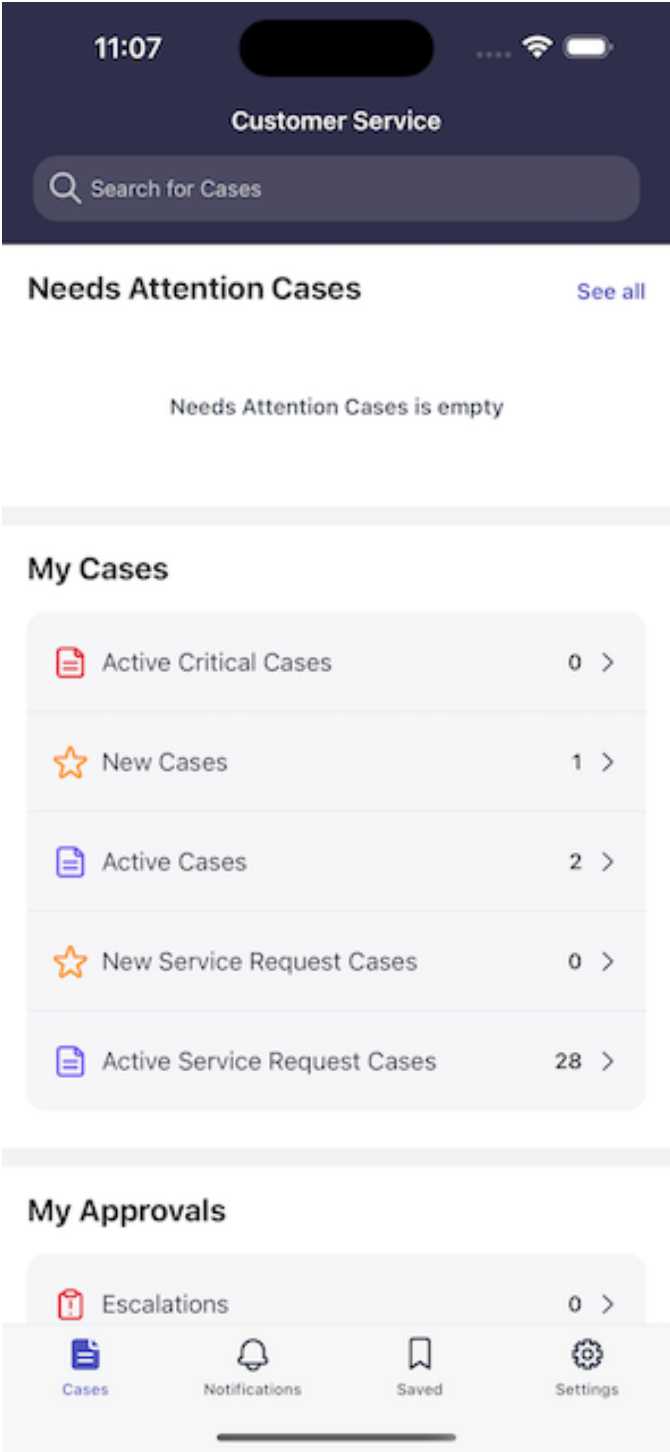
To use the Mobile Agent, the required plugins must be enabled by an administrator. If you're an administrator, see [Configure Mobile Agent for Service Request Playbook](#) to get the information on configuring the Mobile Agent. For instructions on how to get started with the app after an administrator configures these settings, see [Get started with the Customer Service mobile application](#) .

Mobile Agent homepage

When you open the Mobile Agent and log in, an applet launcher is displayed with all the applets that are configured to that launcher.

The following example shows the homepage of the Mobile Agent, which displays an overview of cases.

Mobile Agent applet launcher for agents



The applet launcher includes all the applets that you need to address or resolve service request cases. You have access to the following applets:

New Service Request Cases	All service request cases that are assigned to you in the New state.
Active Service Request Cases	All service request cases that you have access to but haven't been resolved or cancelled, including the cases in the Open , Awaiting Info , and Resolved states.

New Information Request Cases	All service request cases that are assigned to you in the New state.
Active Information Request Cases	All information request cases that you have access to but haven't been resolved or cancelled, including the cases in the Open , Awaiting Info , and Resolved states.

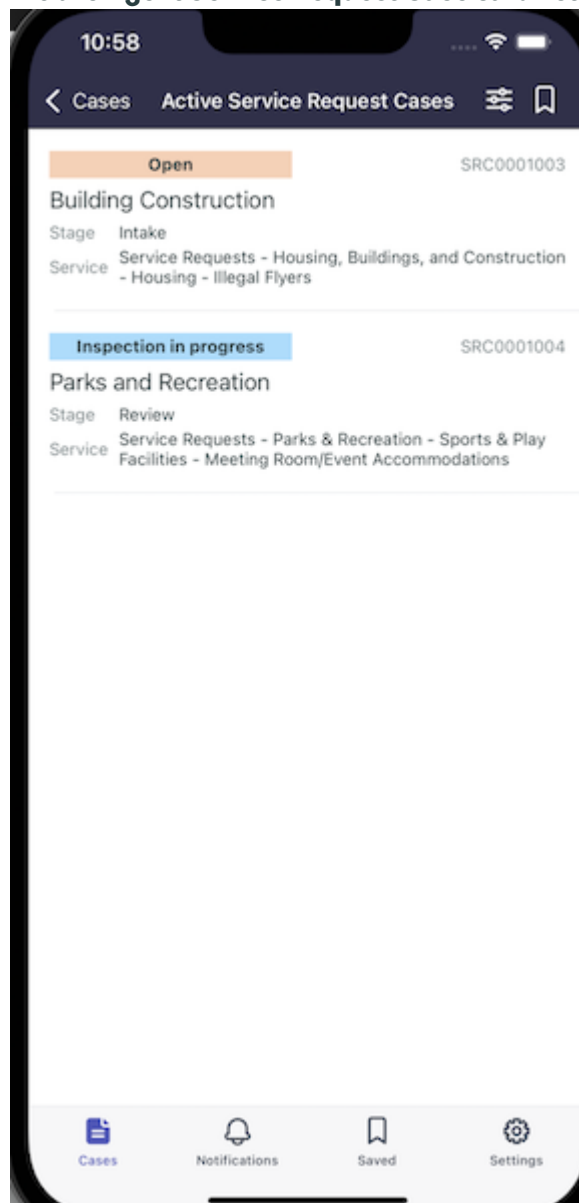
To launch an applet, select it in the app.

Applets and cards

Each applet on the applet launcher screen displays the records that correspond to the applet function. The Active Service Requests applet, for example, when tapped, displays a list of all the active service request case records.

The following example shows a service request card view with a list of all active service request case records.

Mobile Agent Service Request Case card list



The cases in the list are displayed as cards, and the state of the case is displayed at the top of the card. For more information on the case states, see [Life cycle of a Public Service case](#).

Select a card to see the case record details. For example, you can see the case activity, related lists, and case escalations, if any.

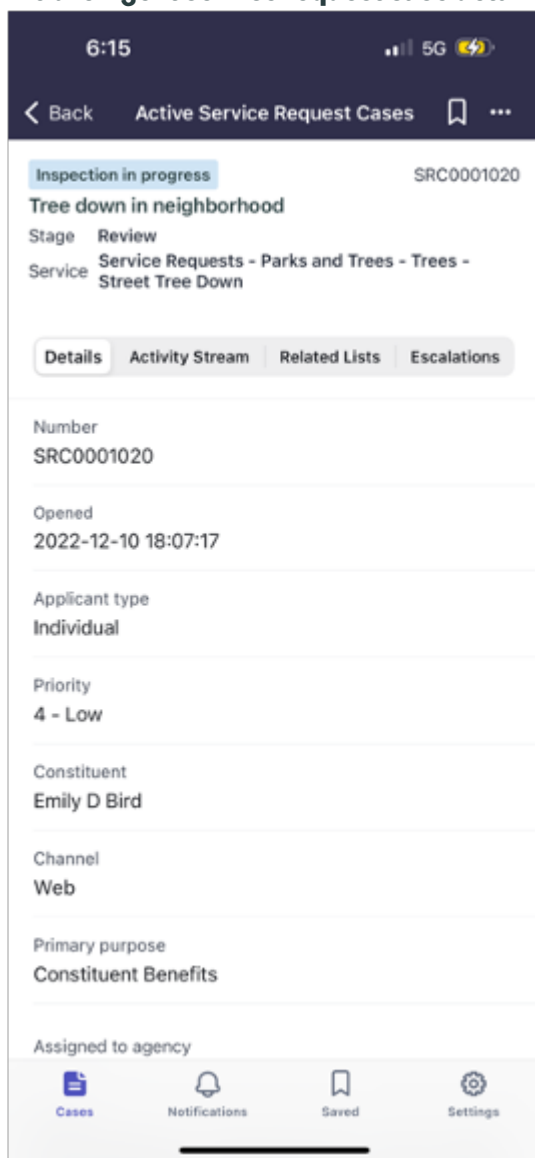
You can narrow down or sort the list of cases by using the filter icon ()

Service Request case cards in the Mobile Agent app

The case cards in the Mobile Agent app display information that is similar to what you would see if you were viewing a case in the CSM Configurable Workspace. For a full list of service request case fields and their descriptions, see [Service Request case form](#).

The following example shows the case details card view. In this view, you can see the case number, case opened date, application type, priority, constituent, channel, primary purpose, and which agency is assigned to the case.

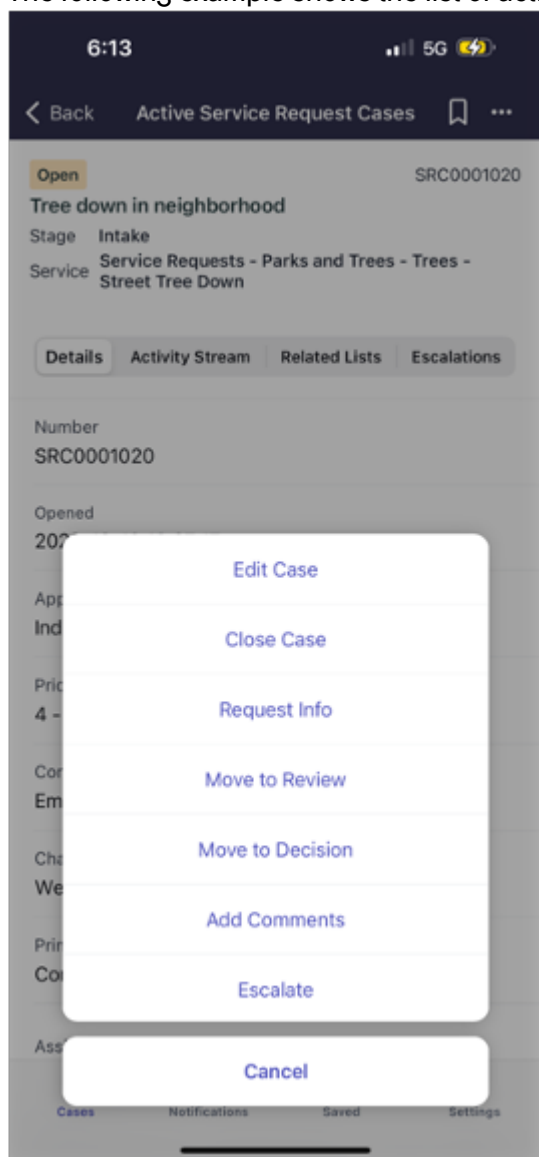
Mobile Agent service request case detail card



As an agent, you can take several actions on service request cases in the Mobile Agent app from within the case cards. In the case detail view, you can select the More Actions icon (⋮) to see a list of actions, and select the back button to return to the record list. These actions include:

- Editing the case.
- Closing the case.
- Requesting more information from the constituent or contact.
- Moving the case to review.
- Moving the case directly to a decision.
- Adding comments.
- Escalating the case.

The following example shows the list of actions that you can take for a service request case.



For more information on the agent tasks in the Mobile Agent app, see [Using the Mobile Agent to perform agent tasks](#).

Information Request case cards in the Mobile Agent

The case cards in the Mobile Agent display information that is similar to what you would see if you were viewing a case in the CSM Configurable Workspace. For a full list of information request case fields and their descriptions, see [Information Request case form](#).

The following example shows the case details card view. In this view, you can see the case number, case opened date, application type, priority, contact, channel, primary purpose, and which agency is assigned to the case.

Mobile Agent information request case detail card

1:15

< Back

Active Information Request Case

...

Under Evaluation

IRC0001049

A Test IR for Business - 2

Stage Review

Service(product) Information Request - FOIA Request - FOIA Request

Priority 4 - Low

Details

Activity Stre...

Exemption C...

...

Number

IRC0001049

Opened

2023-03-27 09:39:32

Requesting on behalf of someone

False

On behalf of

Applicant type

Business

Business

Lemon Software

Business contact

Donnie Brasco Lemon Contact

Priority

Cases

Notifications

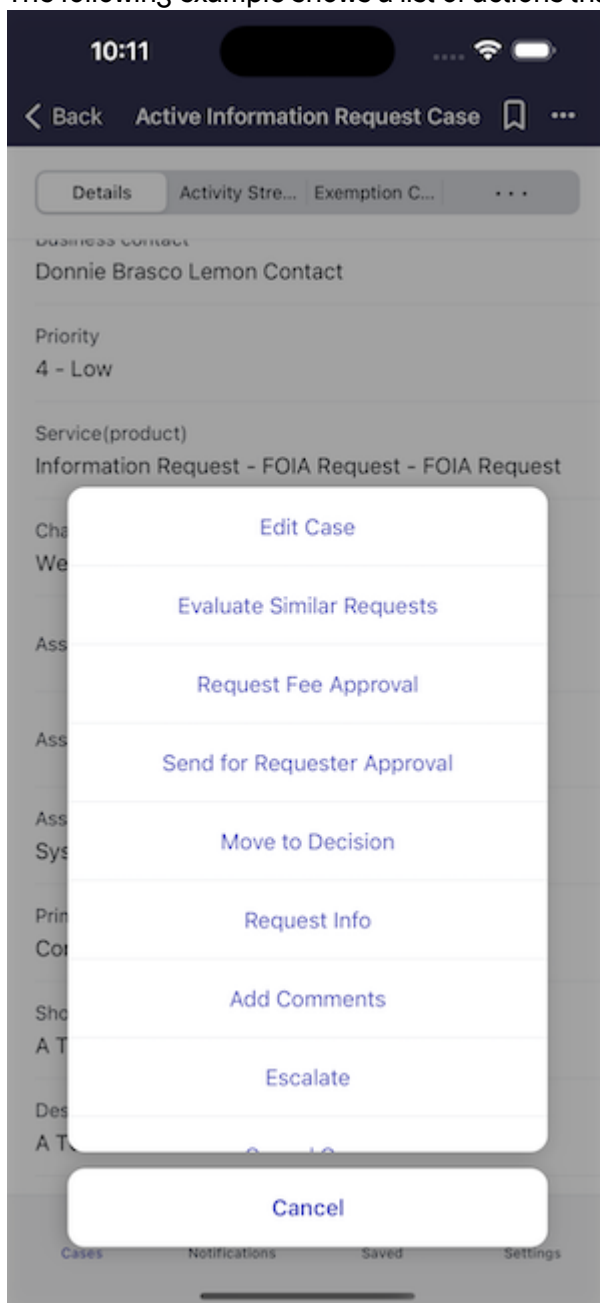
Saved

Settings

As an agent, you can take several actions on information request cases in the Mobile Agent from within the case cards. In the case detail view, you can select the More Actions icon (⋮) to see a list of actions, and select the back button to return to the record list. These actions include:

- Editing the case.
- Closing the case.
- Requesting more information from the requester.
- Requesting fee approvals.
- Evaluating similar information requests.
- Moving the case directly to a decision.
- Adding comments.
- Escalating the case.

The following example shows a list of actions that you can take for an information request case.



For more information on the agent tasks in the Mobile Agent, see [Using the Mobile Agent to perform agent tasks](#).

Navigation bar

The navigation bar appears at the bottom of the mobile application screen. This bar includes the following tabs:

Cases

Displays the main case page. Use this applet launcher to access the case management functionality.

Saved

Displays the saved cases or case lists.

Settings

Manages settings for the mobile application.

Related lists in the Mobile Agent

You can access the related lists that are listed in the following table from within the case details.

Related lists in the Mobile Agent app

Related list	Description
Work Orders	List of work orders that were created for this case. You must install the Field Service Management plugin (com.snc.work_management) to view the work orders.
Case Tasks	Displays a list of case tasks. You can view the following information for the case tasks in this list: • State • Number • Subject • Assigned to • Priority
SLAs	Displays a list of the service level agreements (SLAs) for a case. The following information for SLAs is included in this related list: • Task • SLA Stage • SLA Definition • Actual Elapsed Percentage • Actual Elapsed Time

Related lists in the Mobile Agent app (continued)

Related list	Description
Blocked Tasks	List of blocking tasks that have been created for this case. A blocking task is something that prevents you from making progress toward a case resolution.
Related Parties	List of related parties, such as the contacts or constituents that were added to the case.
Related Cases	Displays a list of the related cases for a case. You can view the following information for the related cases that are included in this list: • Case number • State • Short description • Contact Select a related or child case to view the additional details on the Case form.
Attached Knowledge	Knowledge articles that were attached as a proposed solution to the case.
Documents	List of attached documents for the case.

Using the Mobile Agent to perform agent tasks

If you're a government service agent, you can manage your cases and receive real-time updates on your mobile device with the Mobile Agent.

With the Mobile Agent, you can perform routine actions and approvals from your mobile device anytime and anywhere. The following table describes the tasks that you can perform with the Mobile Agent

whether you're triaging a service request case, or fulfilling an information request.

Government service agent tasks

Agent task	Steps
View a case	View the details of a case and determine if you need to make any changes or take any actions. 1. In the bottom navigation bar, select Cases. 2. Select New to create a case or select Active to see a list of the active service request cases. 3. Select a case to view its details. 4. Determine if you need to make any changes or take other actions. If so, perform any of the tasks in this table.

Government service agent tasks (continued)

Agent task	Steps
	For details on viewing a case in the Mobile Agent, see Track government service requests with the ServiceNow Mobile Agent app .
Edit a case	1. From the Service Requests list, open a case. 2. Tap the More actions icon (⋮) and select Edit Case. For details on the case fields, see Service Request case form.
Add comments to a case	1. From the Service Requests list, open a case. 2. Tap the More actions icon (⋮) and select Add Comments. 3. In the Work Notes or Additional Comments fields, add your work notes or comments about the case. You can also add comments through the activity stream related list. For more information, see Using the activity stream in the Mobile Agent.
Propose a solution for a case	1. Tap the More actions icon (⋮) and select Propose Solution. 2. In the Resolution Code and Resolution Notes fields, add the code and notes that you propose as a solution to resolve the case and then select Submit.
Request more information	1. Tap the More actions icon (⋮) and select Request Info. 2. In the Additional Comments field, add more comments about the request.
Escalate a case	1. Tap the More actions icon (⋮) and select Escalate. 2. In the Escalations dialog box, fill in the details of the escalation.

Government service agent tasks (continued)

Agent task	Steps
View escalations	1. From the applet launcher, select the Escalations applet. 2. View a list of escalations for that case, if any.
Close a case	1. Tap the More actions icon () and select Close Case. 2. In the Resolution Code and Resolution Notes fields, enter the code and your notes about how the case was resolved.

Information request agent tasks

Agent task	Steps
View a case	View the details of a case and determine if you need to make any changes or take any actions. 1. In the bottom navigation bar, select Cases. 2. Select New to create a case or select Active to see a list of the active service request cases. 3. Select a case to view its details. 4. Determine if you need to make any changes or take other actions. If so, perform any of the tasks in this table. For details on viewing a case in the Mobile Agent, see Track information requests with the Mobile Agent.
Edit a case	1. From the Information Requests list, open a case. 2. Tap the More actions icon () and select Edit Case. For details on the case fields, see Information Request case form.

Information request agent tasks (continued)

Agent task	Steps
Add comments to a case	1. From the Information Requests list, open a case. 2. Tap the More actions icon (⋮) and select Add Comments. 3. In the Work Notes or Additional Comments fields, add your work notes or comments about the case. You can also add comments through the activity stream related list. For more information, see Using the activity stream in the Mobile Agent.
Propose a solution for a case	1. Tap the More actions icon (⋮) and select Propose Solution. 2. In the Resolution Code and Resolution Notes fields, add the code and notes that you propose as a solution to resolve the case and then select Submit.
Request more information	1. Tap the More actions icon (⋮) and select Request Info. 2. In the Additional Comments field, add more comments about the request.
Escalate a case	1. Tap the More actions icon (⋮) and select Escalate. 2. In the Escalations dialog box, fill in the details of the escalation.
View escalations	1. From the applet launcher, select the Escalations applet. 2. View a list of escalations for that case, if any.
Evaluate similar requests	1. Tap the More actions icon (⋮) and select Evaluate similar requests. 2. In the Escalations dialog box, fill in the details of the escalation.

Information request agent tasks (continued)

Agent task	Steps
Send for Requester Approval	1. Tap the More actions icon (⋮) and select Send for Requester Approval. 2. In the Send for Requester Approval dialog box, fill in the details of the escalation.
Request Fee Approval	1. Tap the More actions icon (⋮) and select Request Fee Approval. 2. In the Escalations dialog box, fill in the details of the escalation.
View Exemption Checklist	1. From the applet launcher, select the Exception Checklist applet. 2. Review the list of exemptions under the Freedom of Information Act (FOIA) or Public Records Act, and select one or more exemptions if applicable.
Close a case	1. Tap the More actions icon (⋮) and select Close Case. 2. In the Resolution Code and Resolution Notes fields, enter the code and your notes about how the case was resolved.
Cancel a case	Tap the More actions icon (⋮) and select Cancel Case .

Using the activity stream in the Mobile Agent

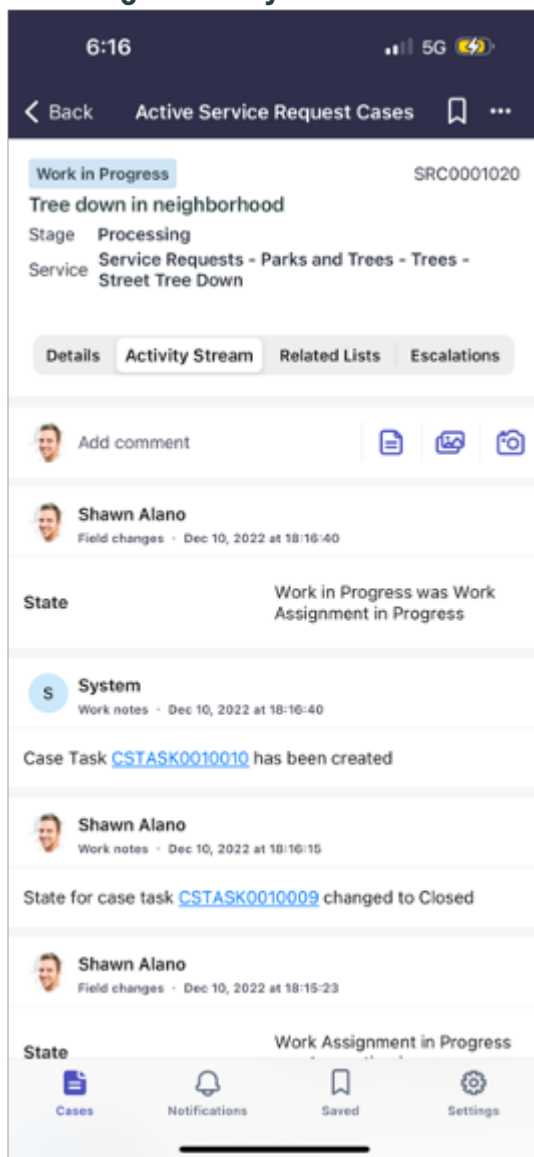
If you're a government service agent, you can access the activity stream from within the case card in the Mobile Agent. You can also communicate with requesters and make internal notes about the work on a record, which means that you can relay and track information more efficiently.

Using the activity stream

As an agent, you can use the activity stream to communicate with constituents and track the information on a record. You can access the activity stream by selecting the activity stream related list.

The following example shows the activity information view for a record in the Mobile Agent.

Mobile Agent activity stream



Agent tasks in the mobile activity stream

The following table lists the tasks that you can do in the activity stream in the Mobile Agent.

Agent tasks

Task	Description
View comments, attachments, or case tasks for the case	Scroll through the Activity Stream section to view all comments, attachments, and case tasks that are associated with the service or information request case.
Add work notes or comments	1. Select Add comment. 2. In the Compose section, add the information to the text field.

Agent tasks (continued)

Task	Description
	3. (Optional) Select the check box to make the comment or work note publicly visible. 4. Select Post. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Add photos or attachments	• Select the document icon () to attach a document to the case. • Select the camera  icon to take a photo to attach to the case. • Select the gallery icon () to attach an existing photo to the case.

Track government service requests with the ServiceNow Mobile Agent app

Track and view the details of all the service requests that are assigned to you by using the ServiceNow Mobile Agent app.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When you select a case in the Mobile Agent application, a form opens with the following sections:

- The case details, including the case number, priority, and status.
- A record of the interaction between the user and the government service agent.
- The action that must be taken on the user's part, such as accepting or rejecting a solution.
- Any attached files.

Procedure

1. Open the ServiceNow Mobile Agent app.
2. Under **My Cases**, select one of the applets in the following table.

Service Request Applet List

Applet	Description
New Service Request Cases	All service request cases that the agent has access to in the New state.

Applet	Description
Active Service Request Cases	All service request cases that the agent has access to that have not yet been resolved or canceled. These cases could be in the Open , Awaiting Info , or Resolved states.

3. Select the service request case that you want to see more details for.

For a detailed description of the service request case fields, see [Service Request case form](#).

Track information requests with the Mobile Agent

Track and view the details of all the information requests that are assigned to you by using the Mobile Agent on your mobile device.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When you select a case in the Mobile Agent app, a form opens with the following sections:

- The case details, including the case number, priority, and status.
- A record of the interaction between the user and the information request case agent.
- The action that must be taken on the user's part, such as accepting or rejecting a case outcome.
- Any attached files.

Procedure

1. Open the ServiceNow Mobile Agent.

2. Under **My Cases**, select one of the applets in the following table.

Information Request Applet List

Applet	Description
New Information Request Cases	All information request cases that the agent has access to in the New state.
Active Information Request Cases	All information request cases that the agent has access to that aren't resolved or canceled. These cases could be in the Open , Awaiting Info , or Resolved states.

3. Select the information request case that you want to see more details for.

For a detailed description of the information request case fields, see [Information Request case form](#).

Analytics and Reporting Solutions for Public Sector Digital Services

Platform Analytics Solutions contain prepackaged Platform Analytics content for use with other ServiceNow AI Platform products. This Platform Analytics Solution provides KPIs and benchmarks to measure the government services provided to constituents.

Required roles

The following roles and tasks are associated with this Solution:

- ServiceNow AI Platform administrator (admin): Install and activate this Analytics and Reporting Solution and make any necessary changes to system properties.
- Platform Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.

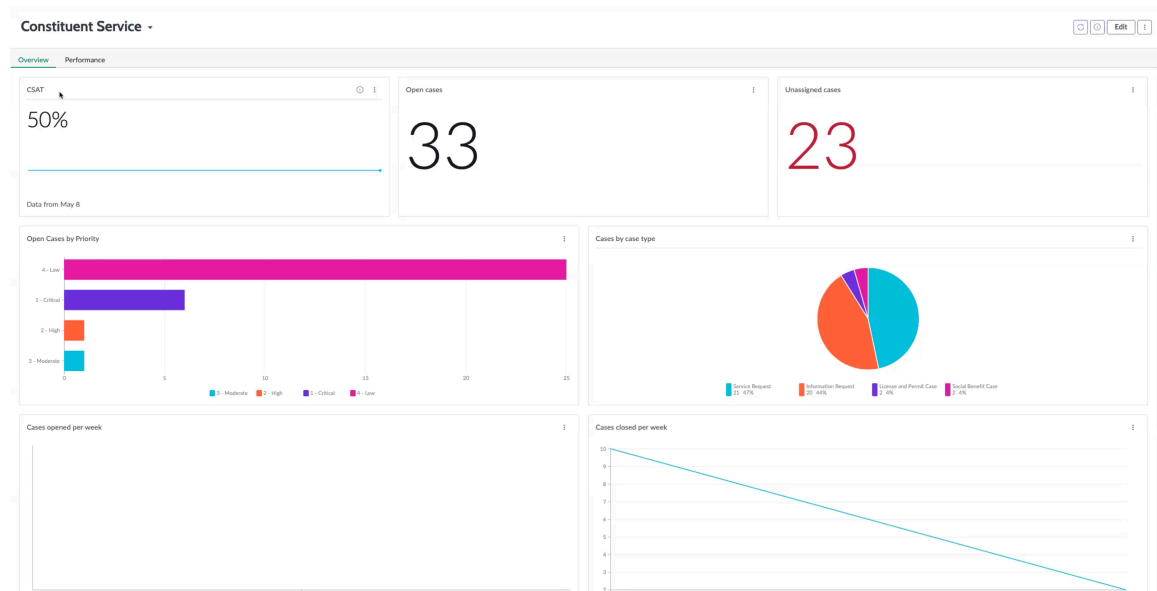
Related topics

[Analytics and Reporting Solutions](#) 

Constituent Service dashboard

Use this dashboard to monitor the health of citizen services, gain insights on how efficiently government cases are handled, and assess the overall performance of services offered.

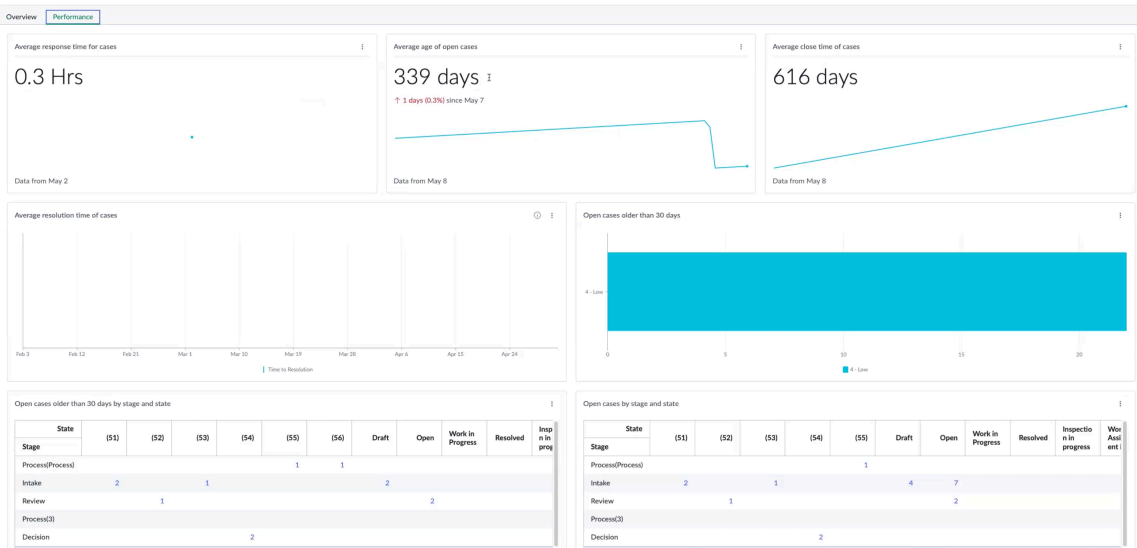
Constituent Service Dashboard Overview tab



Constituent Service Dashboard Performance tab

Constituent Service -

1 0 0 1 Edit 1



Required ServiceNow AI Platform roles

- sn_gsm.constituent_agent, required to view the dashboard widgets and data.
- sn_gsm.constituent_admin, required to edit the dashboard.

Access the Constituent Service dashboard

To open the dashboard, navigate to **All > Platform Analytics > Library > Dashboards**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Constituent Services Dashboard Use cases

User	Dashboard use
Admin or agent	Creates and monitors cases from constituents to accelerate case resolution and increase customer satisfaction. Does the following: • Tracks cases that have been open for a period of time. • Monitors the number of cases for a certain type of service type. • Reviews the average closing time of cases for each service type. • Drills down into details of cases for specific service types.
Government service manager	Monitors the health of government services. Tracks case resolution to drive improvements in service delivery processes and agent performance.

Indicators

Average response time for cases

Average hours for agents to respond to a new government case. This score is calculated by using this formula: $\frac{[[\text{GSM-Summed duration of FirstResponseTime}]]}{[[\text{GSM-Number of Responded Cases}]]}$

GSM-Number of Open Cases

Number of open cases created daily.

GSM-CSAT

Customer satisfaction score based on survey results. The score is calculated by using this formula: $\frac{[[\text{GSM_Number of satisfied customers (CSAT)}]]}{[[\text{GSM_Number of CSAT survey respondents}]]} * 100$.

GSM-Average close time of cases

Average number of days to close cases. This score is calculated by using this formula: $\frac{[[\text{GSM-Summed duration of closed cases}]]}{[[\text{GSM-Number of closed cases}]]} / 24$.

GSM-Average age of open cases

Average number of days that cases remain open. The score is calculated by using this formula: $\frac{[[\text{GSM-Summed age of open cases}]]}{[[\text{GSM-Number of Open Cases}]]} / 24$.

Average resolution time of cases

Average number of days to resolve cases. The score is calculated using this formula: $\frac{[[\text{GSM_Summed duration of resolved cases}]]}{[[\text{GSM_Number of resolved cases}]]} / 24$

GSM-Case Average Response Time

Average length of time for an agent to respond to a case. The score is calculated using this formula: $\frac{[[\text{GSM-Summed duration of FirstResponseTime}]]}{[[\text{GSM-Number of Responded Cases}]]}$.

GSM_Number of resolved cases

Daily count of government cases resolved. The goal for this indicator is to maximize the count.

GSM-Number of closed cases

Daily count of closed cases.

GSM-Number of Responded Cases

Daily count of cases to which agents responded.

The following indicators are not shown directly on the dashboard but are used in calculating formulas:

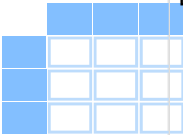
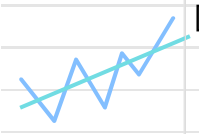
- GSM-Summed duration of closed cases (hours)
- GSM-Summed duration of FirstResponseTime (hours)
- GSM-Summed age of open cases
- GSM-Summed duration of resolved cases (hours)

Breakdowns

- GSM-Account
- GSM-Age
- GSM-AssignedTo
- GSM-AssignmentGroup
- GSM-Category
- GSM-Channel
- GSM-Contact
- GSM-Priority
- GSM-Product
- GSM-State

Data visualizations

Constituent Services Dashboard Data visualizations

Title	Type	Source table	Description
Open cases older than 30 days by stage and state	 Pivot	Government Service Case [sn_gsm_government_service_case]	Detailed summary of open cases older than one month, arranged by stage and state.
Open cases	 Score	Government Service Case [sn_gsm_government_service_case]	Total number of unresolved government cases in the system.
Cases opened per week	 Line	Government Service Case [sn_gsm_government_service_case]	Weekly trend of new government cases opened.
Open cases older than 30 days	Horizontal bar	Government Service Case [sn_gsm_government_service_case]	Distribution of government open cases older than 30 days.

Constituent Services Dashboard Data visualizations (continued)

Title	Type	Source table	Description
Unassigned cases	Score	Government Service Case [sn_gsm_government_service_case]	Total number of government cases not yet assigned to agents.
Cases by case type	Pie	Government Service Case [sn_gsm_government_service_case]	Percentage of government cases by case type.
Open cases by stage and state	Pivot	Government Service Case [sn_gsm_government_service_case]	Detailed summary of open government cases, arranged by stage and state.
Cases closed per week	Line	Government Service Case [sn_gsm_government_service_case]	Weekly trend in government cases closed by agents.
Open Cases by Priority	Horizontal bar	Government Service Case [sn_gsm_government_service_case]	Distribution of unassigned government cases by priority.

Public Services Performance Overview dashboard

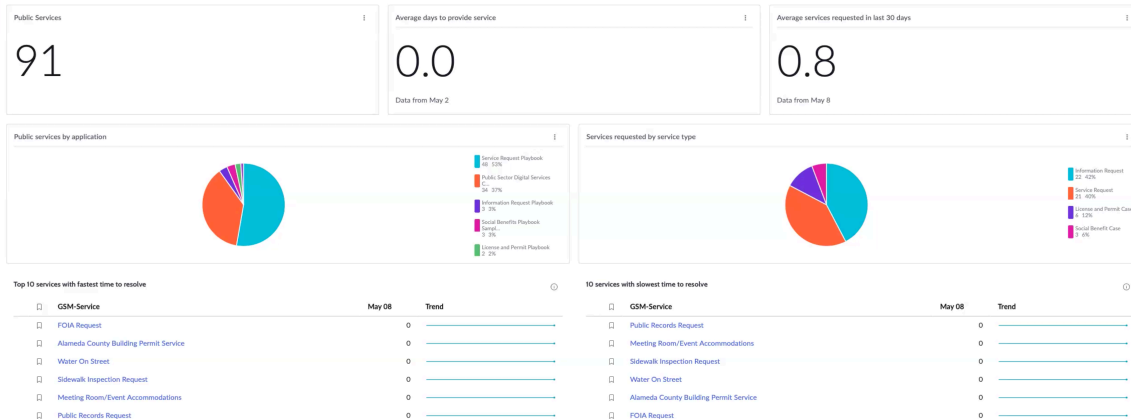
Use the Public Services Performance Overview dashboard to assess key performance indicators and data visualizations on public services offered to and requested by constituents, businesses, and agencies.

Public Services Performance Overview - Overview tab

Public Services Performance Overview -

Overview Edit 1

Overview Benchmarking



Public Services Performance Overview - Benchmarking tab

Public Services Performance Overview -

Overview Edit 1

Overview Benchmarking



Required ServiceNow AI Platform roles

- `sn_gsm.service_offered_viewer`, required to view the dashboard widgets and data.
- `sn_gsm.service_offered_admin`, required to edit the dashboard.

Access the Public Services Performance Overview dashboard

To open the dashboard, navigate to **All > Platform Analytics > Library > Dashboards > Public Services Performance Overview**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Public Services Performance Overview dashboard Use cases

User	Dashboard use
Admin	Reviews benchmarking information to track the public services offered to and requested by constituents, businesses, and agencies.
Government service manager, service viewer, and owner	Monitors the public services offered to and requested by constituents, businesses, and agencies. Does the following: • Observes short and long-term trends and patterns in service delivery. • Identifies opportunities to improve case resolution, agent performance, and the service experience.

Indicators

GSM-Government Case Count for Services requested

Daily number of government services requested by constituents, businesses, and agencies.

GSM-Average of Government Case for Services requested

Daily average of government cases for services requested by constituents, businesses, and agencies. The average is calculated by using this formula: $[[\text{GSM-Government Case Count for Services requested}]]/30$.

GSM-Average resolution duration of Government Cases

Average number of days to resolve government cases.

GSM-Average number of services provided each week by service type

Average count of government services requested each work, by type of service. The count is calculated by using this formula: $[[\text{GSM-Average days to provide services by service type}]]/7$.

GSM-Average resolution duration of Government Cases in last 365 days

Average number of days to resolve government cases in the last 12 months.

GSM-Avg number of services requested each week by service type

Average count of government services requested weekly by service type. The count is calculated by using this formula: $[[\text{GSM-Count of services requested each week by service type}]]/7$.

GSM-Count of services requested each week by service type

Average number of government services requested each week, by service type. Measured daily.

GSM-Average days to provide services by service type

Count of government services provided each week by type of service. Measured daily.

GSM-Government Services with fastest/slowest time to resolve

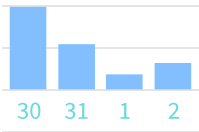
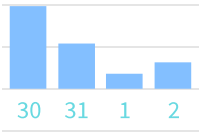
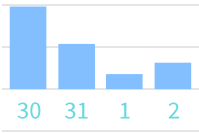
Government services that have the quickest and slowest resolution times.

Breakdowns

- GSM-AssignmentGroup
- GSM-Government.ServiceOffered.Type
- GSM-Product
- GSM-State

Data visualizations

Public Services Performance Overview dashboard Data visualizations

Title	Type	Source table	Description
Top 10 services requested in the last 30 days		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a 30-day (monthly) period.
Top 10 services with most open cases in last 7 days		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a 7-day (weekly) period.
Top 10 services requested in the last 6 months		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a 6-month period.
Services requested by service type	 Pie chart	Government Service Case [sn_gsm_government_service_case]	Distribution (percentage) of government services requested by constituents, businesses, and agencies.
Public Services		Service Definition [sn_case_type_selection]	Total number of all government services available in the system.
Public Services by application	 Pie chart	Service Definition [sn_case_type_selection]	Distribution (percentage) of government services available in the system.

Public Sector Digital Services reference

Reference topics provide additional information about Public Sector Digital Services.

Reference information	Links to topics
Public Sector Digital Services lists and forms	Public Sector Digital Services Core Case Forms Public Sector Digital Services Core Profile Forms
Components installed with Public Sector Digital Services applications	Components installed with Public Sector Digital Services Core Roles installed with Public Sector Digital Services Core Persona-based Roles in Public Sector Digital Services Properties installed with Public Sector Digital Services
Data Model and catalog topics	Public Sector Digital Services data model Public Sector Digital Services Core Role Relationships Government Service Portal service catalog list

Public Sector Digital Services data model

Learn about the Public Sector Digital Services application by viewing data model and role relationship diagrams. These diagrams show the relationships between the tables and roles within the application and provide an overall picture of how the Public Sector Digital Services application operates.

Public Sector Digital Services Data model

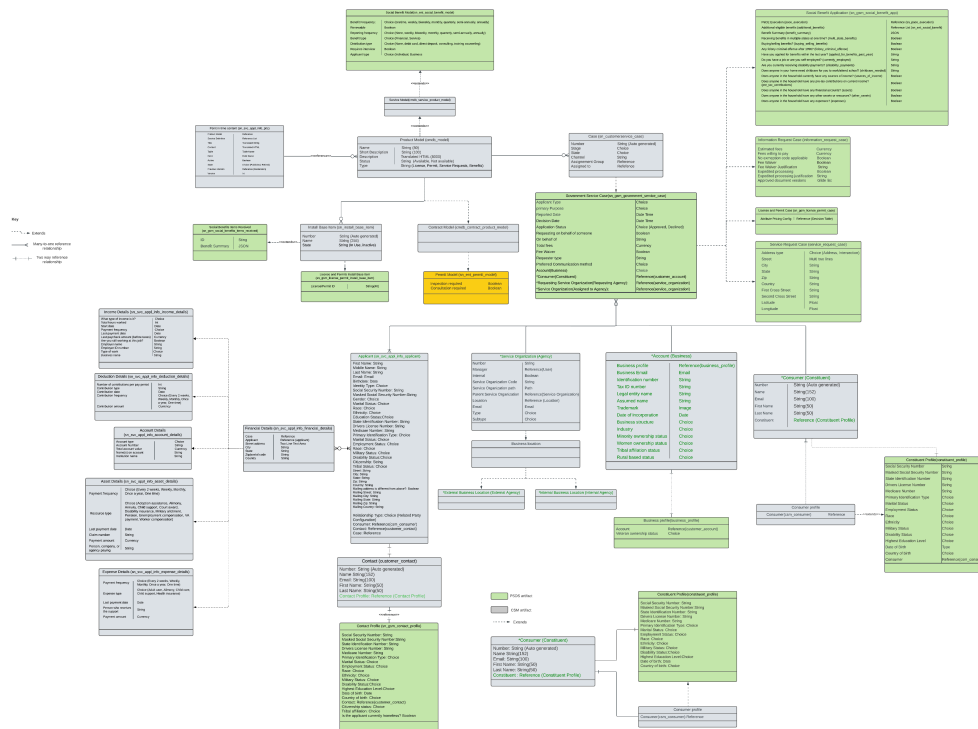
The following diagram shows the tables and their relationships within the Public Sector Digital Services application.

The flexibility of the Public Sector Digital Services platform provides you with a data model that you can extend and leverage to fit your needs.

Use the enhanced install base data model to provide authorized users with additional roles to access (read or update) cases, agency location items, and all install base items.

Note:

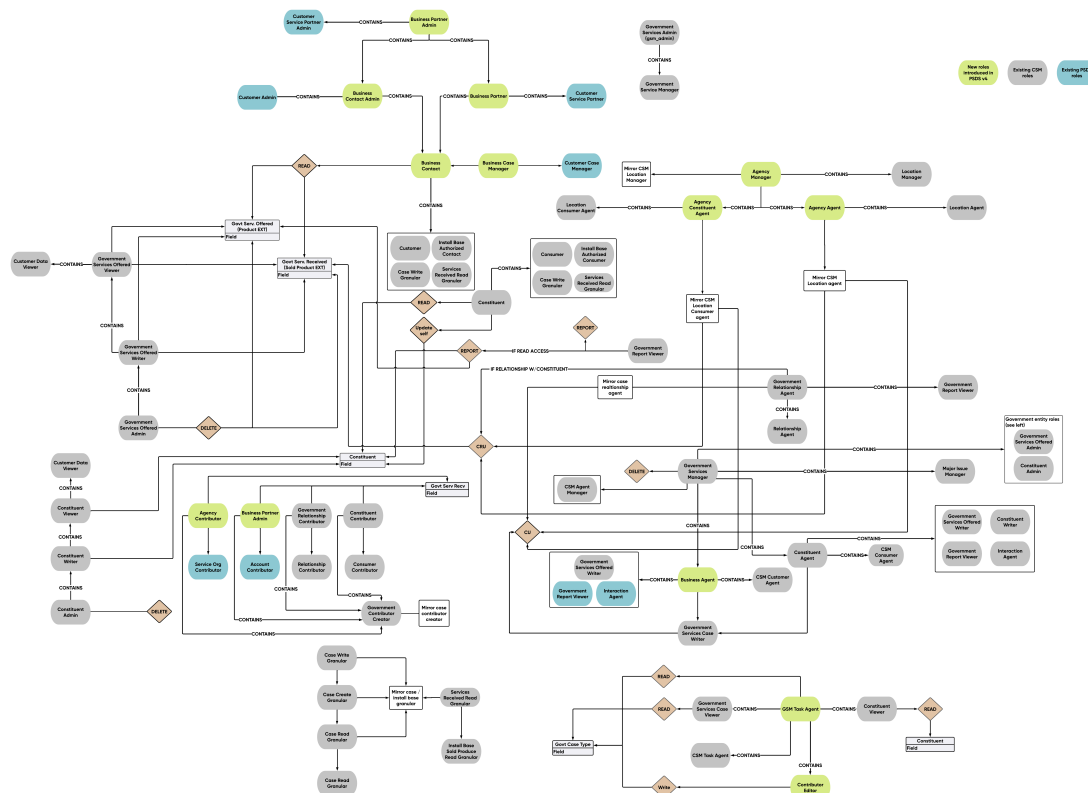
In Public Sector Digital Services v8.0, the Services Offered and Services Received tables have been migrated into the Service Definition table. Category-related fields in government service forms are also removed, and the source table of the Service Offered Performance Overview dashboard has been reparented. For more information, see [Configure a service definition for Playbooks in Public Sector Digital Services](#).



Public Sector Digital Services Core Role Relationships

The following diagram shows the core role relationships within the Public Sector Digital Services application. Use this diagram to understand how each role is related to the other roles within the application.

Core role relationships



Government Service Portal service catalog list

The following services are base system public service catalog items offered in the Government Service Portal.

These services display automatically for registered users. When a user uses one of these catalog items to submit a request, it automatically maps the case to certain pre-built requests. .

For information on how to set up and customize the public services offered by your agency (and displayed in your Government Service Portal service catalog), see [Configure a service for constituent, business, or agency](#).

A user can go to the service catalog and create a case using the categories and sub-categories outlined in the following table.

Public Service Request Catalog Items

Service Request Catalog Items

Category	Subcategory		Description
Animal	N/A	Aggressive Animal	Report truly aggressive animals as opposed to animals that are merely barking or running at large

Service Request Catalog Items (continued)

Category	Subcategory		Description
		Abused and Neglected Animal	Report an injured, abused, neglected or, otherwise, in danger domestic animal.
		Injured Animal	Report any non-owned animal in the public way, public place, city park, on a pole, electrical wire, or train tracks that is injured or sick.
		Wildlife, Stray or Dead Animal Pickup	Report and request the removal of a dead wild or stray animal from the public right-of-way
Housing, Buildings, and Structures	Housing	Abandoned Vehicle (Private Property)	Report abandoned vehicles on private occupied property, private vacant property and public vacant lots/property.
		Housing Inspection, Animal	Report residential animal problems such as animal feces, too many animals and/or exotic animals on occupied private property.
		Housing Inspection, Fire Protection	Report damaged or lack of proper fire protection equipment (e.g., fire extinguisher, fire escape, smoke alarms) in residential rental property
		Housing Inspection, Vacant Residential Property	Report a residential property which has become open to casual entry by the public and represents a hazard to the community.
		Illegal Flyers	Report illegal flyers posted on private property.

Service Request Catalog Items (continued)

Category	Subcategory		Description
Garbage, Recycling & Graffiti	Garbage	Damaged Garbage Bin Replacement	Submit a request for replacement of a damaged garbage bin
		Public Trash Can Issue	Report overflowing public trash cans to be emptied
		Illegal Dumping	Report report large amounts of trash bags or more, bulk items, or building materials that appeared overnight or a witnessed act of dumping from a vehicle
		Missed Residential Garbage	Report missed residential garbage collection
	Recycling	Missed Recycling	Report missed residential recycling collection
	Graffiti	Graffiti Removal	Report graffiti on private or public property
Parks and Trees	Parks	Park Cans	Request to have overflowing trash cans and trash around cans removed from Recreation & Parks properties
		Park Maintenance	Request maintenance at within public park or at a park structure (e.g., pavilion or gazebo). Typical park maintenance requests include trash on grounds, basketball replacement, tennis/ basketball court repairs, fences repairs, bench repairs, masonry work, water fountain repairs and other outside water leaks.
	Trees	Street Tree Down	Report a loose or fallen limb from a city street tree that is a

Service Request Catalog Items (continued)

Category	Subcategory		Description
			hazard to transit or public safety
		Street Tree Inspection	Request an inspection of a City street tree that may need removal or pruning.
		Tree Planting Request	Requests to plant a tree on the City parkway in front of your house.
		Tree Removal Request	Request to remove a dead or diseased tree on the public way.
Public Safety	N/A	Equipment Noise Complaint	Report excessive noise coming from air conditioners, compressors, generators, or any other piece of industrial or commercial equipment.
		Spills or Dumping in Natural Water Ways	Report pollution into rivers, lakes, canal, or sewers.
		Water Supply Issues	Report issues with water supply or no water to property
Streets and Sidewalks	Streets	Street Cleaning Request	Request for curb to curb sweeping the debris off the street by a street sweeping machine
		Water On Street	Report water that remains on the street due to broken fire hydrants, drains etc.
		Remove Obstruction in the Right of Way (ROW)	Report items such as concrete poles, wood, tools, car parts, etc., that are obstructing the Right of Way (ROW)
		Potholes	Report a pothole (surface level damage to a street or a depression/hollow

Service Request Catalog Items (continued)

Category	Subcategory		Description
			in a road surface caused by wear or subsidence.)
	Sidewalks	Sidewalk Inspection Request	Report the condition of City sidewalks or accessibility (ADA) ramp issues
Traffic and Parking	Parking	Broken Parking Meter	Report a broken parking meter
		Parking Complaint	Report suspected illegal parking
	Traffic	Damaged or Missing 'Do Not Enter' signs	Report maintenance issues to damaged or missing "Do Not Enter" signs.
		Damaged or Missing Stop Signs	Report maintenance issues to damaged or missing "Stop" signs
		Damaged or Missing Street Name Sign	Report a damaged or missing street name sign in need of replacement or repair
		Traffic Signal Out	Report traffic signals and/or pedestrian crosswalk signals that are not working or are flashing
Water & Sewer	Sewer	Sewer Investigation	Report any sewer related issues such as sewer/sanitary manhole cover damage/missing, an odor of sewage with no visual evidence, or maintenance of tree roots in a sewer drain which could cause a backup.
	Water	Sewer Overflow	Report sewer water leaking or overflowing from outside pipes.
		Water Meter Cover Missing or Damaged	Report a missing or damaged water meter cover.
		Water Odor or Bad Taste	Report any unusual smell or taste

Service Request Catalog Items (continued)

Category	Subcategory		Description
			associated with a dwelling's tap water.
		Open Hydrant	Report water flowing from a hydrant nozzle.

Information Request Catalog Items

Category	Description
FOIA Request	Submit a request to obtain FOIA information that is not readily available as part of this government agency's normal business services.
Public Request	Submit a request to obtain public information that is not readily available as part of this government agency's normal business services.

License and Permit Request Catalog Items

Category	Description
Request License	Submit an application for a commercial fishing license.

Social Benefits Request Catalog Items

Category	Description
Apply for Nutrition Assistance	Request financial assistance for individuals and families to afford food.
Apply for Unemployment Insurance	Request temporary cash benefits for workers who have become unemployed through no fault of their own and are currently capable of, available for, and actively seeking work.
Request Vocational Rehabilitation Services	Request support for individuals with intellectual and developmental disabilities.

Public Sector forms

Use forms to view and update Public Sector Digital Services information.

The form is the user interface where agents do most of their work. Workspace form configurations work without modification in Configurable Workspace, but the configurations may affect the functioning of your Configurable Workspace.

Case forms and profile forms are the two main form types that government service agents and constituents interact with in the Public Sector Digital Services application. Forms and their fields are customizable by an admin, and can be mapped to specific tables to capture a variety of customer information.

Public Sector Digital Services Core Case Forms

Agents can create case forms to display detailed information about questions, requests, and issues that constituents, business stakeholders, or agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their requests and service cases.

A government service agent creates a case to identify a constituent's request or issue and to track the activities related to resolving the issue. An agent also uses a case to track communication to and from the constituent, including the communication channels being used.

Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the constituent or applicant's name, phone number, and company; account information; application details, and any associated service level agreements (SLAs).

There are several key features to a case.

- Communication between an agent and the constituent or applicant, or between an agent and other employees within the organization. Details of all internal and external communication are recorded on the Case form.
- Any additional tasks that result from a case, such as a work order. Tasks are tracked from a related list on the Case form. These tasks may be internal to the organization or they may involve the constituent.
- Information from the case that can be included in the knowledge base and used to help resolve other cases.

There are two different Case form views: a detailed view that is available to agents and agent managers in the Public Sector Digital Services application and a simplified view that is available to constituent from the Government Service Portal.

Government Service Case form

A government service agent creates a case to identify a constituent's request, and to track the activities related to resolving the issue. The Case form captures and displays detailed information about a constituent's issue or request.

Government Service Case form

Field	Description
Number	Auto-generated number for the case. Numbers for cases use the default prefix GOVCS.
Applicant type	Type of applicant: • Individual • Business • Agency

Government Service Case form (continued)

Field	Description
Business	Name of the business. If the business does not exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact does not exist, the agent can create a business contact record from the case.
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person
Constituent	Name of the constituent. If the constituent does not exist, the agent can create a constituent record from the case.
Requested by agency	Name of the agency that requested the case.
Assigned to agency	Name of the agency that is assigned with the case.
Service	The requested service indicated in the case.
Opened	Date and time that the case was opened.
Priority	The assigned priority: • 1 – Critical • 2 – High • 3 – Moderate • 4 – Low (default)
Assignment group	Assigned government service agent group.
Assigned to	Assigned agent. If a group is selected in the Assignment group field, the assigned agent must belong to this group.
Primary purpose	The reason that the constituent created the case: • Constituent Benefits: services that constituents can apply for. • Governance Procedures: other types of cases such as Frauds, Appeals, Investigations, Complaints.

Government Service Case form (continued)

Field	Description
Partner	The name of the partner company.
Partner contact	The name of the partner contact for this case.
Short description	Brief description of the question, request, or issue.
Applicant Information	
Primary identification type	The type of document used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Identification field	One of the following fields based on the selection in the Primary Identification type field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	The email address of the requester.
Street	The street name for the primary address.
City	The city for the primary address.
State/Province	The state or province for the primary address.
ZIP/Postal Code	The ZIP code or postal code for the primary address.
Country	The country of the requester.
Application Information	
Reported date	The date that the case was submitted. This field defaults to the case creation date but can be changed.
Decision date	The date that a decision about the case was reached.
Application status	The status of the application: • Approved • Declined
Description	A description about the case status.
Notes	

Government Service Case form (continued)

Field	Description
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to Resolved or Closed. Click the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Click the add me icon to add yourself to the watch list.
Additional comments (Customer visible)	Comments for the case that are visible to the constituent.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the Contributor Users field. If this user is removed from the Assigned to field on the Case Task form, and this user is not assigned to any other tasks for the case, the user is also removed from the Contributor Users field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the Contributor Groups field. If the user is removed from the Assigned to field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the Contributor Groups field. If a group is removed from the Assignment group field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the Contributor Groups field.
Resolution Information	
Resolved by	Agent that the case is assigned to when the case is resolved.
Resolved	Date and time that the case was resolved.
Resolution code	List of the resolution states for the case. This field is mandatory when an agent proposes a solution for a case.

Government Service Case form (continued)

Field	Description
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a customer service agent or agent manager closes a case. If a constituent closes a case, it is not mandatory.

Government Service Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks. Government agents are able to access a service request case, information request case, or license and permit case and view the following related lists.

Government service case form related lists

Related List	Description
Case Tasks	Tasks that have been created for this case by the government service agent or agent manager. When you create a task or change the state of a task, the information is recorded in the case Activity field. When you create a case task, the system generates a task number with a prefix. New and existing case tasks, regardless of state, both use the CSTASK prefix.
Related Parties	A list of related parties, such as contacts or constituents added to the case.
Related Cases	A list of cases created for the same account or contact.
Work Orders	A list of work orders created for this case.
Interactions	A comprehensive list of interactions created between constituents and government service agent for this case. Interactions use the IMS prefix.
SLAs	The service level agreements that are associated with this case.
Draft Emails	Emails that are unsent.
Emails	The case email log. A list of the emails that are sent or received as part of resolving this case. The government service agent or agent manager can send email from within the case, such as updates and inquiries to constituents or other agents or parties. A change in the state of the case triggers an automatic email to be sent to the constituent. Constituent contacts can create and update cases by email as well as receive updates from government service agents.
Blocked Tasks	A list of blocking tasks that have been created for this case. A blocking task is something that prevents the agent from making progress toward case resolution.
Escalations	A list of escalation records that are related to this case.

Government service case form related lists (continued)

Related List	Description
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Appointments	Appointments that the government agent makes with the constituent or others as part of resolving this case. When you create an appointment, an appointment creation message is recorded in the case Activity field. The user selected in the To field on the appointment form receives an email with the appointment details.

Service Request case form

A government service agent can create a case using the Service Request case form to capture detailed information about questions, requests, and issues that constituents, business stakeholders, or agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their requests and service cases.

A government service agent creates a case to identify a constituent's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track communication to and from the constituent, including the communication channels being used.

Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the constituent's name, phone number, and company; account information; product and asset information; service contract and entitlement details, and any associated service level agreements (SLAs).

There are several key features to a case.

- Communication between an agent and the constituent or an agent and other employees within the organization. Details of all internal and external communication are recorded on the Case form.
- Any additional tasks that result from a case, such as a work order. Tasks are tracked from a related list on the Case form. These tasks may be internal to the organization or they may involve the constituent.
- Information from the case that can be included in the knowledge base and used to help resolve other cases.

There are two different Case form views: a detailed view that is available to agents and agent managers in the Public Sector Digital Services application and a simplified view that is available to external constituents from the Government Service Portal.

Agent view

The agent view of the Case form includes the following components:

- A timeline that provides a visual display of case activities.
- Referenced entities for the case including account and contact information, product and asset information, service contract and service entitlement details, and any pertinent SLAs. Except for SLAs, this information exists in the system and can be associated with the case by the agent or agent manager.
- All communication about the case, both external and internal. This information is stored in the **Additional comments** field (external communication), the **Work notes** field (internal communication), the **Resolution notes** field. The **Resolution notes** field stores details about the case resolution, and the **Activity** field, which stores all communication in a chronological list.

Agents and managers can view a Case form in the Public Sector Digital Services application by navigating to **Lists > Service Requests** and selecting one of the following menu options:

- **All**
- **My Cases**
- **My Open**
- **Unassigned for my group**

From the Case list, click a case number to display the Case form.

Government Service Case form (agent view)

Field	Description
Number	Auto-generated number for the case. Numbers for cases use the default prefix GOVCS.
Opened	Date and time that the case was opened.
Applicant type	Type of applicant: • Individual • Business • Agency
Business	Name of the business. If the business does not exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact does not exist, the agent can create a business contact record from the case.
Constituent	Name of the constituent. If the constituent does not exist, the agent can create a constituent record from the case.
Priority	How quickly the agent should address the service request. Priority ranking is as follows: • 1 – Critical • 2 – High • 3 – Moderate • 4 – Low (default)
Channel	Method by which the constituent initiated contact and the case was opened:

Government Service Case form (agent view) (continued)

Field	Description
	• Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person
Primary purpose	The reason that the constituent created the case: • Constituent Benefits: services that constituents can apply for. • Governance Procedures: other types of cases such as Frauds, Appeals, Investigations, Complaints. Defaults to Constituent Benefits.
Service	The requested service indicated in the case. By default, this field will show public services with 'Service type' = Service Requests.
Assigned to agency	Name of the agency that is assigned with the case.
Requested by agency	Name of the agency that requested the case.
Assignment group	Assigned government service agent group.
Assigned to	Agent(s) the case is assigned to. If a group is selected in the Assignment group field, the assigned agent must belong to this group.
Service	Requested service that is indicated in the case.
Short description	Brief description of the question, request, or issue. Users can use the related search results to find a list of knowledge base articles with a possible solution.
Request Location	
Address Type	The type of location where the issue is being reported. Address or Intersection
Street	The address where the issue is located. This field is only required if Address is selected as the Address type.
First Cross Street, Second Cross Street	The cross streets where the issue is located. This field is only required if Intersection is selected as the Address type.
City	The city where the issue is located.

Government Service Case form (agent view) (continued)

Field	Description
State/ Province	The state or province where the issue is located.
ZIP/Postal Code	The ZIP code or postal code where the issue is located.
Country	The country where the issue is located.
Latitude, Longitude	The coordinates where the issue is located. This field is required for either address type, and auto-populates based on the address data entered.
Request Details	
Reported date	The date that the case was submitted. This field defaults to the case creation date but can be changed.
Description	A description about the case status.
Applicant Information	
Primary identification type	The type of document used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Identification field	One of the following fields based on the selection in the Primary Identification type field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	The email address of the requester.
Street	The street name for the primary address.
City	The city for the primary address.
State/ Province	The state or province for the primary address.
ZIP/Postal Code	The ZIP code or postal code for the primary address.
Country	The country of the requester.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to Resolved or Closed. Click the add me icon to add yourself to the watch list.

Government Service Case form (agent view) (continued)

Field	Description
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Click the add me icon to add yourself to the watch list.
Additional comments (Constituent visible)	More information about the issue as needed. All users who can view incidents can also see additional comments.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the Contributor Users field. If this user is removed from the Assigned to field on the Case Task form, and this user is not assigned to any other tasks for the case, the user is also removed from the Contributor Users field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the Contributor Groups field. If the user is removed from the Assigned to field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the Contributor Groups field. If a group is removed from the Assignment group field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the Contributor Groups field.
Resolution Information	
Resolved by	The agent to whom the case is assigned when the case is resolved.
Resolved	Date and time that the case was resolved.
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Resolution code	List of the resolution states for the case. This field is mandatory when an agent proposes a solution for a case. By default, this field is set to Resources Not Approved.

Government Service Case form (agent view) (continued)

Field	Description
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a government service agent or agent manager closes a case. If a constituent closes a case, it is not mandatory.
Related Records	
Parent	Associated parent incident that makes the current incident a child incident. Note: When the parent incident is resolved, the child incident is also marked as resolved.
Problem	Any related problem record.
Change Request	Any related change request.
Caused by Change	Associated change request that prompted the creation of the incident.

Constituent view

Users with the constituent or business contact role can view Case forms by selecting **Your Cases** in the government service portal header, then selecting the case number from the Case list.

The constituent or business contact view of the Case form includes the following components:

- A process flow formatter that indicates the current state of the case.
- The related entity information, including agency and contact information, pending service case task information, and service request information.
- An **Activity** field that stores all communication for the case in a chronological list.

Service Request Case Task form

Service Request case form displays detailed information about a service request case task.

The Service Request Case Task form displays information about service request case tasks, which are created and assigned to agents to complete the work to resolve service request cases.

The case task form includes the following fields.

Service Request Case Task form

Field	Description
Number	Automatically assigned case task number.
Priority	Assigned priority: • 1 - Critical • 2 - High

Service Request Case Task form (continued)

Field	Description
	• 3 - Moderate • 4 - Low (default)
Parent	Case that this case task was created for. This can be a case from the Case table (sn_gsm_government_service_case) or any child tables of the Case table.
State	Current state of the case task: • Open • Awaiting Info • In Progress • Closed
Associated Table	Table associated with this task.
Associated Record	Records that are associated with this task.
Assigned to	Assigned user.
Subject	Subject of the case task.
Description	Description of the work that needs to be done in order to complete the case task.
Work Notes List	Customizable list of agents that can view the work notes.
Work notes (Private)	Free-form private work note text viewable to assigned agents only.
Additional comments	Notes that are visible to the constituent. Agents can use this field to request more information from the constituent.

Information Request case form

A government agent can create a case by using the Information Request case form to capture detailed information about public record requests that constituents, business stakeholders, or other agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their information requests.

Information Service Case form

Field	Description
Number	Auto-generated number for the case. The numbers for the cases use the default prefix GOVCS.
Opened	Date and time that the case was opened.
On Behalf Of	Name of the contact for which the record is being requested on behalf of. This field is required if the Requesting on behalf of someone check box is selected.

Information Service Case form (continued)

Field	Description
Applicant type	Type of applicant: • Individual • Business • Agency
Business	Name of the business, if the business is selected as the applicant type. If the business doesn't exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact doesn't exist, the agent can create a business contact record from the case.
Constituent	Name of the constituent, if the individual is selected as the applicant type. If the constituent doesn't exist, the agent can create a constituent record from the case.
Priority	Assigned priority: • 1 – Critical • 2 – High • 3 – Moderate • 4 – Low (default)
Service	Requested service that is indicated in the case.
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person
Assigned to agency	Name of the agency that is assigned to the case.
Assignment group	Government agent group to which this case is assigned.
Assigned to	Name of the agent that is assigned to this case. If a group is selected in the Assignment group field, the assigned agent must belong to this group.
Primary purpose	Reason that the constituent created the case:

Information Service Case form (continued)

Field	Description
	• Constituent Benefits: Services that constituents can apply for. • Governance Procedures: Other types of cases such as frauds, appeals, investigations, or complaints.
Short description	Brief description of the question, request, or issue.
Applicant Information	
Primary identification type	Type of document that is used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Preferred communication method	Preferred communication method of the requester: • None • Email • Mail • Call
Identification field	Field that is based on the selection in the Primary Identification type field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	Email address of the requester.
Street	Street name for the primary address.
City	City for the primary address.
State/Province	State or province for the primary address.
ZIP/Postal Code	ZIP code or postal code for the primary address.
Country	Country of the requester.
Application Information	
Description	Description about the case status.
Fee waiver	Whether the requester believes the case qualifies for a fee waiver.
Fee waiver justification	Justification for a fee waiver qualification. Certain types of requesters automatically qualify for a fee waiver.

Information Service Case form (continued)

Field	Description
Expedited processing	Whether expedited processing is needed.
Expedited processing justification	Justification for requesting expedited processing.
Requester type	Type of requester: • Representative of the news media • Educational Institution • Non-commercial scientific institution • Commercial use requester • All other requesters
Fees willing to pay	Estimate of the fees that the requester is willing to pay to have this request fulfilled.
Estimated fees	Estimate of the fees required to fulfill this request.
No exemption code applicable	Box that is selected if none of the nine exemptions from the exemption checklist apply to this case.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to Resolved or Closed . Select the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Select the add me icon to add yourself to the watch list.
Additional comments (Customer visible)	Comments for the case that are visible to the constituent.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the administrator, agent, and agent manager.
Contributors	

Information Service Case form (continued)

Field	Description
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the Contributor Users field. If this user is removed from the Assigned to field on the Case Task form, and this user isn't assigned to any other tasks for the case, the user is also removed from the Contributor Users field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the Contributor Groups field. If the user is removed from the Assigned to field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the Contributor Groups field. If a group is removed from the Assignment group field on the Case Task form, and the group isn't assigned to any other tasks for the case, the assignment group is removed from the Contributor Groups field.
Resolution Information	
Resolved by	Agent that the case is assigned to when the case is resolved.
Resolved	Date and time that the case was resolved.
Resolution code	List of the resolution states for the case. This field is required when an agent proposes a solution for a case.
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is required if a customer service agent or agent manager closes a case. If a constituent closes a case, it isn't required.

Information Request Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks.

Information request case form related lists

Related List	Description
Related Parties	A list of related parties, such as contacts or constituents added to the case.
Documents	Agents can:

Information request case form related lists (continued)

Related List	Description
	• Add documents to the information request without making them visible to the requester • View a list of documents added to the Information Request • View documents approved to be published to the requester • Publish approved documents to the requester To view the Documents related list, you must first install the Document Management plugin.
Escalations	A list of escalation records that are related to this case.
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Appointments	Appointments that the information request case agent makes with the constituent or others as part of resolving this case. When you create an appointment, an appointment creation message is recorded in the case Activity field. The user selected in the To field on the appointment form receives an email with the appointment details.

Public Sector Digital Services Core Profile Forms

Profile forms display detailed information about a constituent, agent, or business. This information is collected on registration for the Government Service Portal.

Business Profile form

Use the Business Profile form in Public Sector Digital Services to capture and display the details about a business. You can add the name and address of the business owner, trademark status, industry information, partner records, or business structure.

The Business Profile form displays detailed information about a business and its contacts. This information is collected on registration for the Government Service Portal.

Business Profile form

Field	Description
Business	
Name	Name of the business.
Email	Primary contact email for the business.
Street	Street address where the business is located.
City	City where the business is located.
State/ Province	State or province where the business is located.

Business Profile form (continued)

Field	Description
Zip / Postal Code	ZIP code of the business address.
Country	Country where the business is located.
Business Phone	Primary contact phone number for the business.
Business Information	
Customer	Customer contact for the business.
Partner	Partner of the business.
Identification Number	Reference number for the business entity.
Tax ID number	Tax ID number.
Business Structure	Details about the structure of the business.
Legal Entity Name	Name of the business owner.
Trademark	Trademark of the business.
Assumed Name	Registered business owner name.
Date of incorporation	Date that the business was incorporated.
Industry	Industry of the business.
Additional Information	
Minority ownership status	Option to indicate that a business is owned by a minority.
Rural based status	Option to indicate that a business is based in a rural area.
Tribal affiliation status	Option to indicate that the business owner is affiliated with a tribe.
Women ownership status	Option to indicate that a business is owned by a woman.
Veteran Ownership Status	Option to indicate that a business is owned by a veteran.
Contact registration information	

Business Profile form (continued)

Field	Description
Business registration code	Registration code. If a request is submitted with a valid registration code, the business account information is automatically detected and added to the business record.
Primary Contact Information	
Primary identification type	Type of primary identification: • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Identification field	Type of identification. This field appears only when an option is selected from the Primary identification type field: • Social Security Number • State Identification Number • Drivers License Number • Medicare ID

Agency Profile form

Use the Agency Profile form in the Public Sector Digital Services application to capture and display the details about an agency and the cases that they're involved in.

The Agency Profile form displays detailed information about an agency and its agents.

Agency Profile form

Field	Description
Number	Auto-generated number for the agency.
Name	Name of the agency.
Manager	Name of the agency manager.
Parent Agency	Name of the parent agency.
Street	Mailing street address of the agency.
City	City in which the agency is located.
State/Province	State or province in which the agency is located.
Zip/Postal Code	ZIP or postal code of the agency.
Website	URL of the agency website.
Email	Primary contact email of the agency.
Phone	Primary contact phone number of the agency.
Identification Number	Auto-generated identification number for the agency.

Agency Profile form (continued)

Field	Description
Type	Type that defaults to Agency
Subtype	Agency subtype: • Local • County • State • Federal

Agency Service Constituent Profile form

Use the Agency Service Constituent Profile form in the Public Sector Digital Services application to display detailed information about a constituent, such as the name and address, date of birth, contact information, and language choice.

The following table describes the detailed information that you can add to the Agency Service Constituent form.

Agency Service Constituent form

Field	Description
Consumer reference	Reference number for the constituent case.
First name	First name.
Last name	Last name.
Middle name	Middle name.
Number	Phone number of the constituent.
Suffix	Suffix of the constituent name. The suffix may include MD or Jr.
Mobile phone	Mobile phone number for the constituent.
Business phone	Business phone number for the constituent.
Fax	Fax number.
Photo	Photo of the constituent.
Email	Email of the constituent.
Gender	Gender of the constituent.
Date of birth	Date of birth of the constituent.
Country of birth	Country of birth of the constituent.
Age	Age of the constituent.
Identification Information	
Primary identification type	Type of primary identification: • Social Security Number • State Identification Number

Agency Service Constituent form (continued)

Field	Description
	• Drivers License Number • Medicare ID
Identification field	Type of identification. This field appears only when an option is selected from the Primary identification type field. • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Primary correspondence Information	
Primary address type	Type of primary address for the constituent: • Home address • Business address • Mailing address
Street	Street of the constituent.
City	City that the constituent lives in.
State/Province	State in which the constituent lives.
ZIP/Postal code	ZIP code for the address of the constituent.
Latitude	Latitude of the address of the constituent.
Longitude	Longitude of the address of the constituent.
Primary phone number	Primary phone number of the constituent.
Additional information	
Marital status	• Married • Single • Divorced • Widowed • I do not wish to provide this information
Employment status	• Employed • Unemployed • Self employed • I do not wish to provide this information

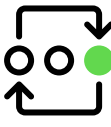
Agency Service Constituent form (continued)

Field	Description
Race	- American Indian or Alaska Native - Asian - Native Hawaiian or other Pacific Islander - Black or African American - White - I do not wish to provide this information
Ethnicity	- Hispanic or Latino - Not Hispanic or Latino - I do not wish to provide this information
Military status	- Active duty - Veteran - No military duty - I do not wish to provide this information
Disability status	- Yes, I have a disability - No, I do not have a disability - I do not wish to provide this information
Highest education level	- High school or equivalent - Technical or occupational certificate - Associate degree - Some college coursework completed - Bachelor's degree - Master's degree - Doctorate - Professional - Other
Primary language choice	- English - Spanish
Notes	
Notes	Additional notes about the constituent or the case.

Now Assist for PSDS

With the Now Assist for Public Sector Digital Services (PSDS) application, your agents can use generative AI to summarize the details and comment activity of each public service case to get the context of the case. They can also generate the case resolution notes to share with other agents.

Get started

Explore  Learn more about Now Assist for Public Sector Digital Services (PSDS)	Configure  Configure the Now Assist for Public Sector Digital Services (PSDS) application.	Use  Use generative AI capabilities offered by Now Assist for Public Sector Digital Services (PSDS).
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Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the [KB1584492](#)  article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the [KB0743854](#)  article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see [KB2593939: Regulated Markets AI Products/Skills Not Available](#) . Be sure to check for availability updates in future releases.

Troubleshoot and get help

- [ServiceNow Community AI & Intelligence](#) 
- [Search the Known Error Portal for known error articles](#) 
- [Contact Customer Service and Support](#) 

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Further, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes.

This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by [ServiceNow's AI Acceptable Use Policy](#) , which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our [CORE Compliance Portal](#) .

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect case information (for case summarization) and test run information (for test summarization).

Customers can opt out of future data collection at any time, as described in the [Now Assist Opt-Out page](#) .

For more information, see the [Now Assist documentation](#) .

Exploring Now Assist for Public Sector Digital Services (PSDS)

With the Now Assist for Public Sector Digital Services (PSDS) application, your agents can use generative AI to summarize the details and comment activity of each public service case to get the context of the case. They can also generate the case resolution notes to share with other agents.

The following generative AI capabilities are available for an agent:

- A case summary enables an agent to gather the case context on long-running or complex cases. Because these cases can contain a lot of information, including the conversations with the constituent or other agents, an agent can generate a summary to gain understanding faster.
- The case resolution notes can help an agent to wrap up cases faster and provide the context about the case resolution to the other agents who might encounter similar issues.

Skills

The Now Assist for PSDS application includes the generative AI skills that enable your agents to understand the case context so that they can propose resolutions to the constituent or approve an application faster.

Case summarization

Provides an agent with a summary of a public service case, including the issue and the actions taken. An agent can generate a summary of a case to understand the case context, refresh the summary so that it includes the latest updates to the case, and post the summary to the case work notes.

The case summarization skill generates a case summary and displays it above the activity stream. The summary includes the information that the agent enters in the following case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Email
- Service level agreement (SLA)

Case record with case summary

The screenshot displays the ServiceNow Case record interface for a case titled "Nutrition Assistance - Jerry Rice". The interface includes a sidebar with "Activities" and "Issue" sections. The "Issue" section is highlighted with a red box, showing "Key Actions Taken" and "Updated 2024-06-05 19:09:59". The main content area shows the "Check for duplicate benefits" task, including a summary of the request, similar requests, and a "Notes" section.

Resolution notes generation

Enables an agent to generate the resolution notes for a case, propose the resolution to the constituent or applicant, and add the information to the case record.

The resolution notes generation skill displays a pop-up window that an agent can use to select a resolution code and review the resolution notes text before proposing a resolution to a constituent or relaying a decision to an applicant.

Note:

The resolution notes generation skill requires a minimum of 200 words in the case record to generate the resolution notes. If the resolution notes can't be generated, the system displays a message below the **Resolution notes** field.

Now Assist panel in CSM Configurable Workspace

An agent can use the Now Assist panel in CSM Configurable Workspace. This conversational interface enables an agent to request a case summary and generate the case resolution notes. For more information about the Now Assist panel, see [Now Assist panel](#).

Now Assist in AI Search

The Now Assist in AI Search application uses Now LLM Service to extract actionable Q&A Genius Result answers from the knowledge articles that are found in Service Portal, Virtual Agent, Employee Center, and global searches. By using this application, an agent can improve the customer's experience by retrieving the relevant content from the knowledge base and generating concise answers. For more information, see [Now Assist in AI Search](#).

Sensitive data handling

Personally identifiable information and other sensitive data can be masked so that it does not appear in generative AI prompts. Placeholder text is sent with the prompt instead, and that placeholder text is replaced with the original text after the response has been received. This

two-way masking ensures that your users see the correct values, but the Now LLM Service is not exposed to any sensitive information. For more information, see [Multi-turn catalog ordering](#).

Related topics

[Now Assist](#)

[Exploring Now Assist](#)

Chat summarization in Now Assist for Public Sector Digital Services (PSDS)

Use the chat summarization feature in Now Assist to auto-generate summaries of chat conversations in Virtual Agent. The chat summary helps an agent gain an understanding of the interaction without reading the entire transcript of the conversation, and saves your requester from having to repeat the same information they provided to the Virtual Agent.

Summarize a chat with Now Assist for Customer Service Management

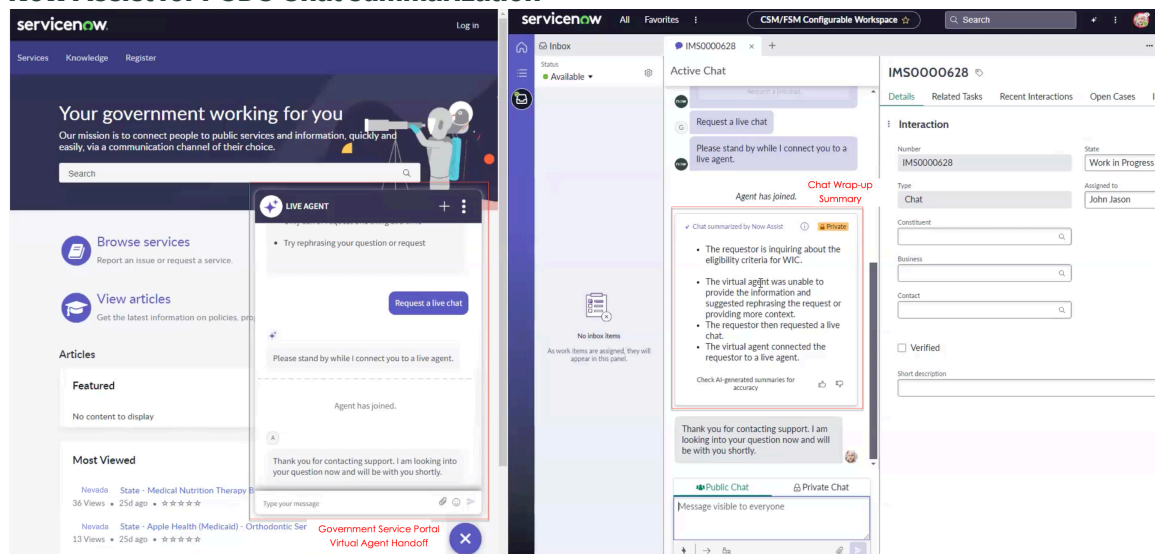
The chat summarization skill generates a condensed version of the conversation between live agents or between a requester and Virtual Agent. A chat summarization is auto-generated when:

- The conversation ends
- The agent uses the `/summarize` quick action in Agent Chat
- The agent selects **Chat Summarization** or enters `summarize chat` in the **Ask Now Assist** to field on the Now Assist panel
- An interaction is transferred from Virtual Agent to a live agent and the conversation is more than six lines long. The chat summary displays in a summary card in the conversation.

In the playbook Interaction record, Chat Summary and Short Description fields are automatically generated after chat has ended, with the blue box indicating that Now Assist has modified the field value. When the system generates a summary and automatically populates the **Chat summary** field, it also displays an AI icon above the field which indicates that the summary is generated by AI, and displays a banner at the top of the Interaction record. The message in the banner advises the agent to check the summary for accuracy and update the information if it isn't accurate.

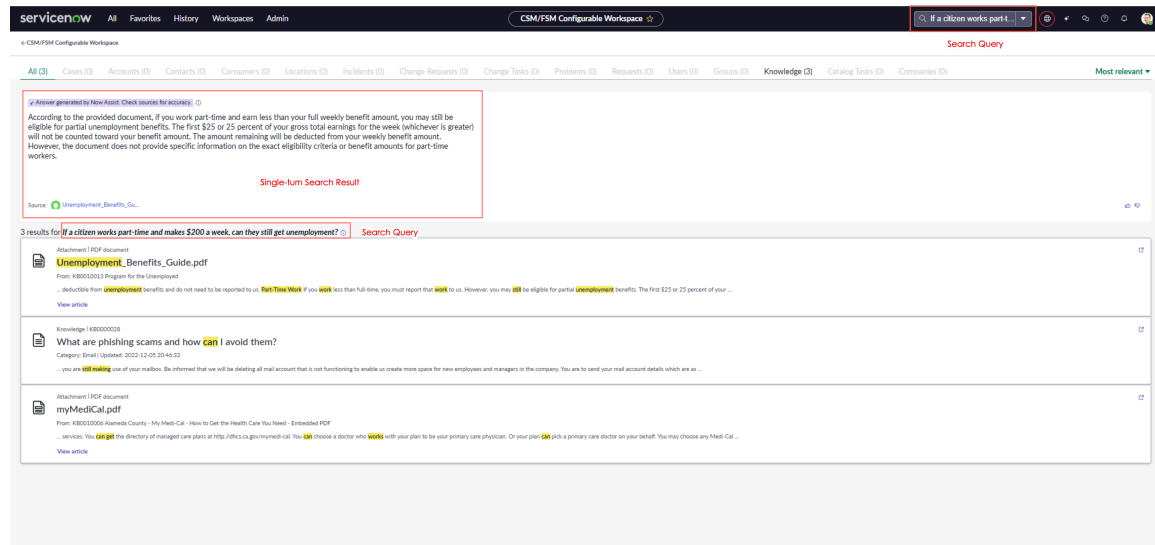
When a chat summary is generated, it's automatically added to the **Chat summary** field on the Interaction record. An agent can modify and save the information in the **Chat summary** field.

Now Assist for PSDS Chat summarization



AI Search for Now Assist for Public Sector Digital Services (PSDS)

The AI Search index stores data from Platform records, knowledge base articles, or external sources, and makes that data available for agents to search in the CSM Configurable Workspace. An admin can configure where the data is pulled from. Search query features use ServiceNow AI Platform technologies to improve the search user experience.



Watch this video to see how Public Sector Digital Services agents can find answers using AI Search. For information on AI Search see [AI Search](#) .

AI Search overview video, approximately three minutes and six seconds long.

Install and configure Now Assist for Public Sector Digital Services (PSDS)

If you have the admin role, you can install and configure the Now Assist for Public Sector Digital Services (PSDS) application so that your agents can use the generative AI skills in CSM Configurable Workspace and in Core UI.

Before you begin

Role required: admin

About this task

Use the Now Assist Admin console to configure Now Assist for Public Sector Digital Services (PSDS). This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see [Now Assist Admin console](#).

The following table lists the features and skills that you can access from the Now Assist Admin console.

Public Sector Digital Services features and skills in the Now Assist Admin console

Public Sector Digital Services features	Skills
Chat	• Chat summarization • Chat recommendation • Sidebar recommendation
Case	• Case summarization • Resolution notes generation
Search	• Legislation summarization • Search summarization • Extract Q&A answers from knowledge base articles upon search

Note:

Now LLM Service is currently the only provider for this Now Assist application's skills.

To get started with Now Assist, you must install at least one Now Assist application on your instance. The Now Assist Admin console can guide your implementation, starting with installation. Check out the [Now Assist Journey Checklist](#) .

The following plug-ins and store apps are required for use of Now Assist for Public Sector Digital Services (PSDS) and its features, such as AI Search and summarization skills:

- Now Assist Admin Console (sn_nowassist_admin)
- Now Assist for Public Sector Digital Services (PSDS) (sn_psds_gen_ai)
- Now Assist for Customer Service Management (CSM) (sn_csm_gen_ai)
- Glide Virtual Agent (com.glide.cs.chatbot)
- Glide Conversation Generative AI (com.glide.cs.genai)

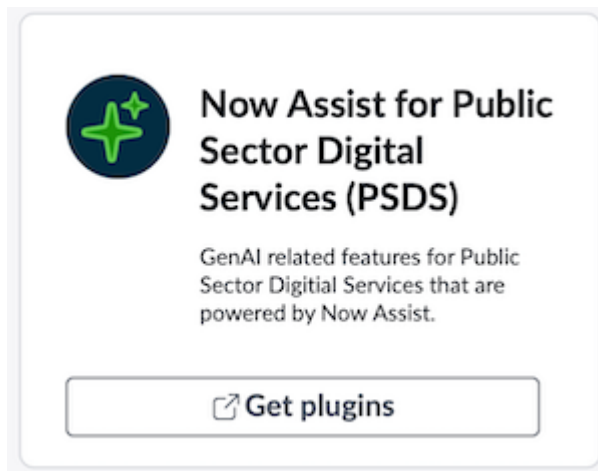
Procedure

1. Install the Now Assist for Public Sector Digital Services (PSDS) plugin (com.sn_psds_gen_ai).
2. Navigate to **All > Now Assist Admin > Settings**.

If you're already in Now Assist Admin, select the **Settings** tab.

3. On the **Settings** page, select **Plugins**.

Plugins appear as cards. Review all Now Assist plugins on the **Available for you** tab. Plugins that you have already installed appear on the **Installed** tab.



4. Select **Get plugins** on the Now Assist for Customer Service Management (CSM) and Now Assist for Public Sector Digital Services (PSDS) cards.
5. In the confirmation window, select **Install Plugin** to open the ServiceNow Store page for the plugin in a new browser tab.
6. Install the plugin from the ServiceNow Store page.

Some applications might require you to request the app from the ServiceNow® Store first. After you have requested the application from the ServiceNow® Store page, navigate to **All > System Applications > All Available Applications > All** to finish the installation.

7. Return to the Now Assist Admin console.
8. In the dialog box, select **Refresh**.

Result

Your Now Assist Admin console is successfully configured with the necessary plug-ins. Select **View all (Plugin) Assists and Skills** to review the features of your new plugin, or close the dialog box to return to the Now Assist Admin console.

What to do next

Turn on the Now Assist panel  or [Activate a Now Assist Skill](#).

Configure a skill in Now Assist for Public Sector Digital Services (PSDS)

Configure the triggers, settings, and display locations for Now Assist skills to enable GenAI capabilities across the Public Sector Digital Services agent platform.

About this task

The following skills can be enabled and customized in Now Assist for PSDS:

- Chat Summarization
- Case Summarization

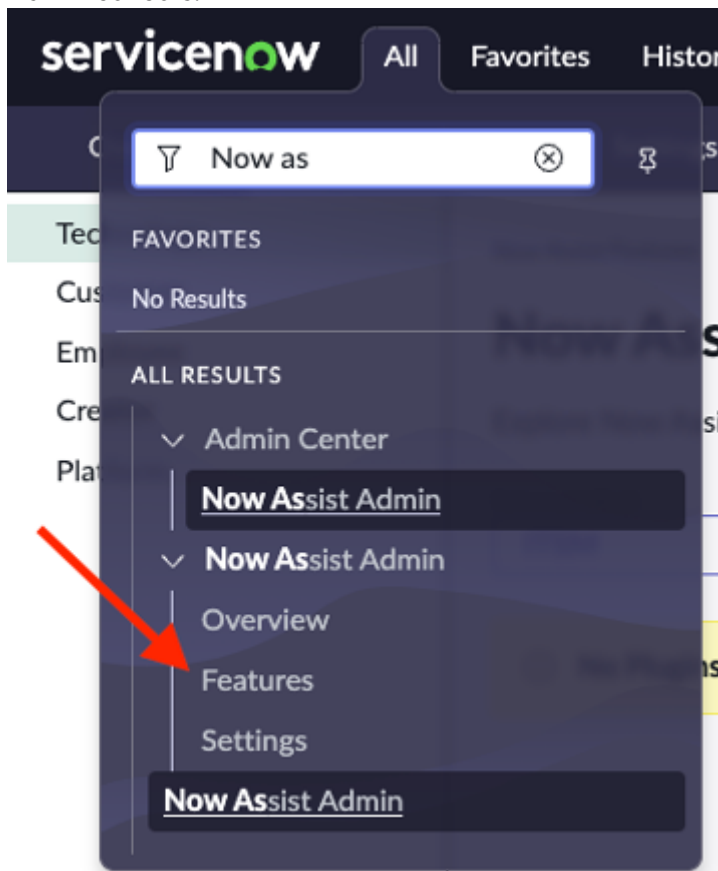
The Now Assist Admin console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see [Now Assist Admin console](#) .

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Now Assist Admin > Features** to access the **Features** tab of the Now Assist Admin console.

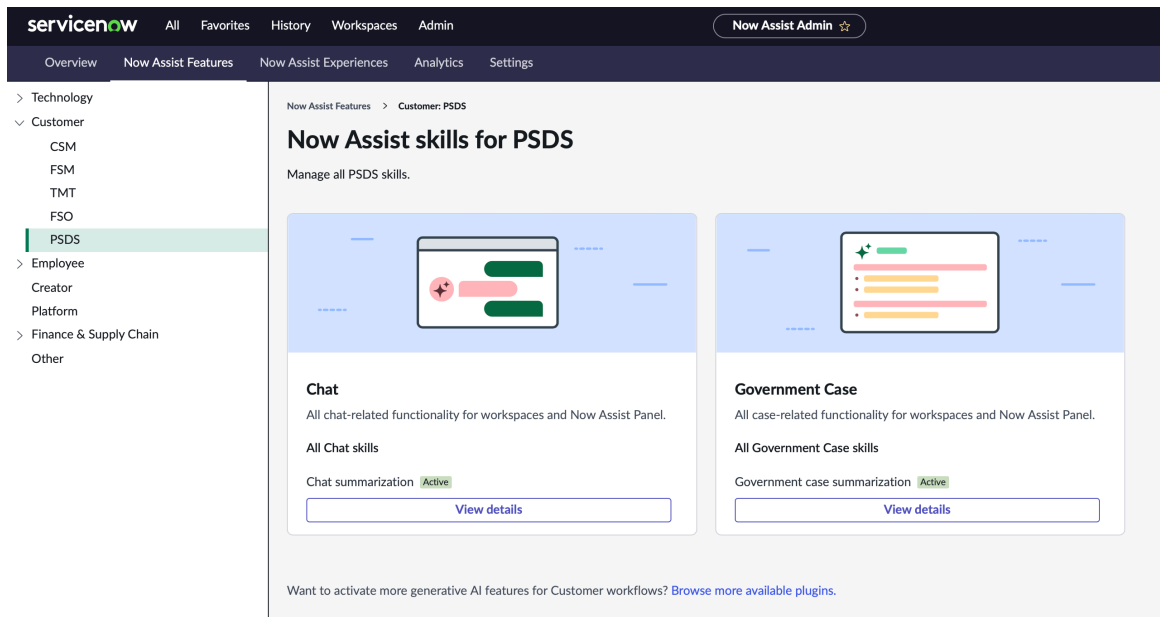


2. Activate and configure the skills for the Now Assist for PSDS.

The following Now Assist for PSDS skills can be customized:

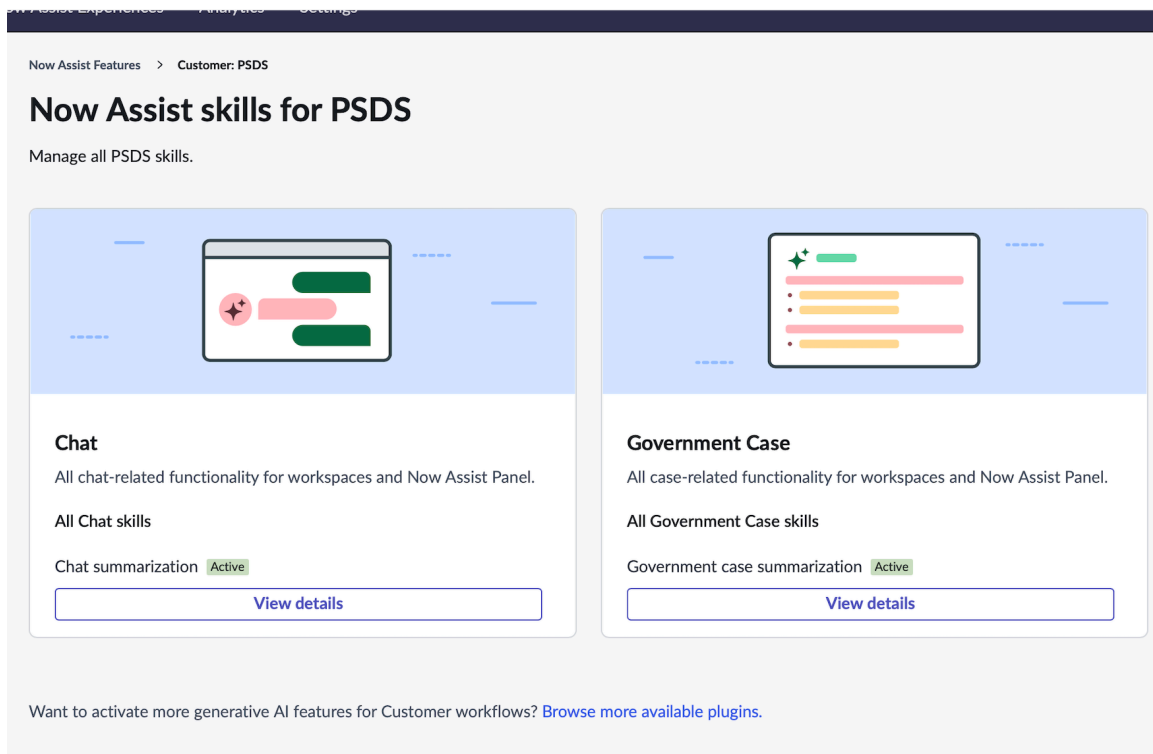
- Case Summarization
- Chat Summarization

These features are grouped under the **Customer** workflow group. Select **PSDS** in the drop-down menu to access the skills for Now Assist for Public Sector Digital Services (PSDS). Each feature has its associated skills.



3. On the feature card that is associated with the skill that you would like to activate, select **View details**.

For the Government case summarization skill, select **View details** under the Government case feature card.



4. In the All available skills section for the desired feature, select **Activate skill**.

5. Select the inputs or triggers for the selected skill.

Example Define trigger screen for the Chat summarization skill

6. After you configure all inputs or triggers for the selected skill, select **Save and continue** to go to the next step.

You can return to a previous step by using the **Back** button.

7. Define the availability of the skill.

Note:

This step applies to the case summarization and resolution notes generation skill. If you're configuring the chat summarization skill, you'll see the next step as **Choose input**. You can select the customer-facing portals that you want to use as the source of the input data. The default product portal and portals that are already in use by other products can't be selected.

You can configure the skill to be consistently available to users, or you can select conditions that must be met before the skill is available. Selecting **Customize skill availability** displays a condition builder.

8. After you configure the skill availability, select **Save and continue** to go to the next step.

9. Select where you would like to display the skill.

- **In-product:** When selected, the Now Assist skills are displayed on forms and workspaces. For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.
- **Now Assist panel:** When selected, Now Assist skills are available in the Now Assist panel. If you don't see this option, you must activate the Now Assist panel. For more information, see [Turn on the Now Assist panel](#). For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

Note:

Selecting **In-product** enables the case summarization card to show on the process-based experience playbook page in the CSM Configurable Workspace. For Government case summarization, select **In-product**.

10. After you configure the display for the selected skill, select **Save and continue** to go to the next step.
11. Review your choices and select **Activate** to complete the configuration.

The screenshot shows the ServiceNow interface for configuring a skill. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Admin', and a 'Now Assist Admin' button. Below this is a search bar and a 'Settings' tab. The main header is 'Government case summarization' with a sub-tab 'PSDS' and an 'Exit' button. On the left, a sidebar lists configuration steps: 'General details', 'View input', 'Customize prompt', 'Define Availability', 'Select display', and 'Review and activate' (which is highlighted). The main content area is titled 'Review and activate' and contains a sub-header 'Go over the default setup and turn on the skill for agents. Explain this'. It is divided into two columns. The left column, 'What data is used as input?', lists three cases: 'Case new', 'Case work in progress', and 'Case resolved', each with an 'Input table' (Government Service Case) and 'Input fields' (Description, Short description, State, Work notes, Additional comments). The right column, 'What are the prompt output sections?', lists three cases: 'Case new', 'Case work in progress', and 'Case resolved', each with 'Prompt Sections' (Issue, Key Actions Taken, Resolution). At the bottom right, there are 'Back' and 'Activate' buttons, with a red arrow pointing to the 'Activate' button.

Result

Your skill is configured.

What to do next

You can go back to the Now Assist features page to configure another skill.

Related topics

[Now Assist](#)

[Install and configure Now Assist for Public Sector Digital Services \(PSDS\)](#)

[Using Now Assist for Public Sector Digital Services \(PSDS\)](#)

Enabling and configuring AI Search with Now Assist for PSDS

Configure and use the AI Search engine in the Now Assist for Public Sector Digital Services (PSDS) application.

Generative AI Q&A in CSM Configurable Workspace

The screenshot displays the ServiceNow CSM/FSM Configurable Workspace interface. At the top, there's a navigation bar with tabs for AI, Favorites, History, Workspaces, and Admin. The main header shows 'CSM/FSM Configurable Workspace' and a search bar with the query 'If a citizen works part-time...'. Below the header, a list of categories is visible: AI (3), Cases (0), Accounts (0), Contacts (0), Consumers (0), Locations (0), Incidents (0), Change Requests (0), Change Tasks (0), Problems (0), Requests (0), Users (0), Groups (0), Knowledge (3), Catalog Tasks (0), and Companies (0). The 'AI' tab is selected, showing a search result for the query 'If a citizen works part-time and makes \$200 a week, can they still get unemployment?'. The result is a PDF document titled 'Unemployment_Benefits_Guide.pdf' from KB0000013, which discusses unemployment benefits for part-time workers. The document text is partially visible, mentioning that part-time workers may be eligible for partial unemployment benefits if they work less than full-time and earn less than their full weekly benefit amount.

Now Assist for PSDS supports additional configuration for AI Search, such as search profile configuration.

Enable AI Search for Now Assist for Public Sector Digital Services (PSDS)

Enable the Now Assist in AI Search application to extract actionable Q&A Genius Result answers from knowledge articles found in the Service Portal, Virtual Agent, Employee Center, and global searches.

About this task



Note:

By default, Now Assist Search is enabled in Now Assist for Public Sector Digital Services (PSDS). Follow these steps only if the application has been previously disabled.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > AI Search > AI Search Status**.
2. If the screen says you do not have AI search on the instance, select **Request AI Search**.
3. Wait until AI Search is displayed as activated and ready for use.



AI Search is ready

Congratulations! AI Search is activated and ready for use!

Configure AI search profiles with Now Assist for PSDS

You can enable AI Search users to search content and metadata from documents in all or part of the knowledge bases, external repositories, and remote tables.

AI Search for Now Assist for Public Sector Digital Services (PSDS) stores search experience settings in search profiles. Define a search profile for each unique search experience that you want to offer users in a ServiceNow AI Platform application. Create and populate synonym and stop word dictionaries. Configure typo handling dictionary settings. Define Genius Results and result improvement rules.

A search profile contains settings that determine how AI Search generates search results for a given search. The search application's configuration specifies which search profile to use, and also determines how the generated results are displayed to users.

For more information on AI search profiles, see [Search profiles in AI Search](#) .

Create a search profile using Now Assist for PSDS

Create a new search profile to store search experience settings for Now Assist for PSDS AI Search.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > AI Search > Search Experience > Search Profiles**.
2. Select **New**.
3. On the Search Profile form, fill in the fields.
For a description of the field values, see [Search Profile form](#) .
4. Select **Submit**.

Result

The new search profile appears in the AI Search Search Profiles list with **State** set to *New*. An informational message and an alert triangle icon () indicate that the new search profile has never been published.

What to do next

Your new search profile includes sample synonym and stop word dictionaries and a default typo handling dictionary. For more details on configuring and populating these dictionaries, see [Synonyms](#) , [Stop words](#) , and [Typo handling](#) .

To make content searchable using your new search profile, link one or more search sources to it.

Link a search source to a search profile in Now Assist for Public Sector Digital Services (PSDS)

Link search sources to a search profile to specify the content that a government service agent can search through that profile.

Before you begin

Role required: admin

About this task

Linking a search source to a search profile makes its filtered content available for searches using that search profile. AI Search only indexes and uses content from the search profile's linked search sources when finding and generating standard search results and Genius Result answers.

Procedure

1. Navigate to **All > AI Search > Search Experience > Search Profiles**.
2. Open the search profile that you want to link the search source to.
To configure single-turn AI Search for use in the Now Assist Panel, select the **[CSM AIS] Configurable Workspace Search Config** search profile,
3. In the Search Sources related list, select **Link Existing**.
To configure single-turn AI Search, select the Genius Results related list, then select **Link Existing**.
4. On the Search Profile-Search Source Mapping form, fill in the fields.

To configure single-turn AI Search, enter **Now Assist Q&A** in the Genius Result Configuration field, and set the order to **1**.

For a description of the field values, see [Search Profile - Search Source Mapping form](#).

5. Select **Submit**.

The screenshot shows the ServiceNow interface for configuring an AI Search Profile. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The breadcrumb trail is 'AI Search Search Profile - [CSM AIS] Configurable Workspace Search Config'. The page title is 'Search Profile'. Below the title, there is a description field and a 'Main Content' button. The 'Configuration' section is expanded, showing a table with columns for 'Search Sources', 'Synonyms', 'Stop Words', 'Typo Handling', 'Genius Results', 'Result Improvement Rules', and 'Mirrored Result Improvement Rules'. The 'Genius Results' tab is selected, and a table lists the search sources. The first entry is 'Now Assist Q&A' with an order of 1, active status, and a trigger condition of 'Always'.

Result

The new search source appears in the Search Sources or Genius Results related list. Search query results immediately reflect changes to the set of records searchable through the search profile.

What to do next

To make a search profile's settings active in search queries, you must publish it.

Publish a search profile in Now Assist for Public Sector Digital Services (PSDS)

Publish a search profile to make its settings, and any pending changes to its settings, active in search queries.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > AI Search > Search Experience > Search Profiles**.

Note:

Search profiles with the *New* state display an alert triangle icon () . An informational message notifies you to publish these search profiles.

2. Open the search profile that you want to publish.
3. Select **Publish**.

Result

The search profile appears in the AI Search Search Profiles list with **State** set to *Published*, and can be used to filter what search sources are being indexed by the Now Assist for PSDS AI Search.

Configure the chat summarization skill in Now Assist for Public Sector Digital Services (PSDS)

If you have the admin role, you can configure the Now Assist for Public Sector Digital Services (PSDS) skill so that agents can use the generative AI skills in CSM Configurable Workspace and in the Public Sector Digital Services Core UI.

Before you begin

Role required: admin

About this task

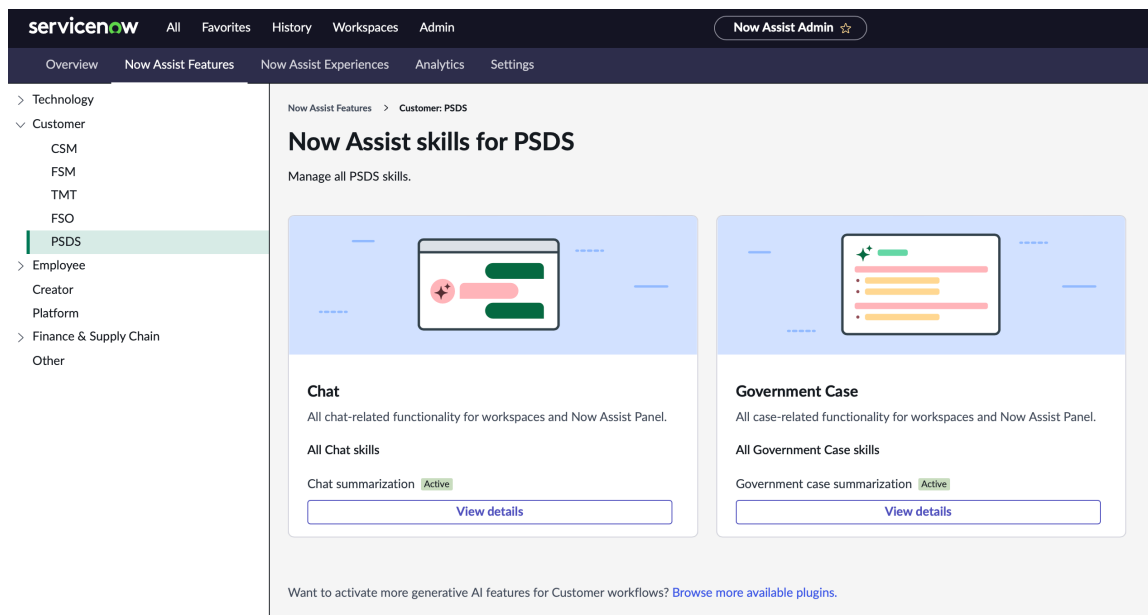
Agents can use chat summarization, powered by Now LLM, to gain contextual understanding of support issues throughout a chat's life-cycle, even if it involves virtual agent interactions, transfers to live agents, or multiple handoffs between agents.

In the Now Assist for PSDS Admin Console, admins can:

- Define the trigger that determines when a summary is generated (chat handoff, quick action, wrap-up)
- Define where to display (CSM Configurable Workspace, Now Assist panel, or both)
- Add/remove roles to control who can view the skill

Procedure

1. Navigate to **All > Now Assist Admin > Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the dropdown, select **Customer > PSDS**.



3. On the Chat feature card, select **View Details**, then select **Chat Summarization** under Active Skills.

By default, the chat summarization skill is activated for Now Assist for PSDS. If it isn't active, select **Activate Skill** in the All available Chat skills section of the chat recommendation card.

4. Select **Define Trigger**, the first step in the guided setup.

By default, many of the options in the setup are configured for the most common use cases. You can use the **Back** button to navigate through the steps.

5. Using the toggles, select what actions trigger the chat recommendation skill.

6. Select whether you want the summary to be formatted with bullet points.

By default, summaries are written with bullet points, but can be configured to appear in paragraph form by toggling this off.

7. Go to **Choose Input** by selecting **Save and continue**.

8. **Optional:** Select any additional data sources that you want the large language model (LLM) to consider when generating the chat summary.

9. **Optional:** Select any additional portals to enable chat summary generation for conversations occurring on that portal.

Note:

If **Add Additional Data Sources** is toggled on, the admin **must** specify a portal and enable a specific channel in the Portals dropdown for the requester to be able to initiate the chat on that portal. Otherwise, the agent will receive an error message. By default, the Government Service Portal is selected as the portal, and can't be deselected.

10. Select **Save and continue**.

11. Go to **Select display**, and select where you would like to display the skill.

You can select both in-product, Now Assist panel, or both.

- **In-product:** When selected, Now Assist skills are displayed on forms and workspaces.
- **Now Assist panel:** When selected, Now Assist skills are available in the Now Assist panel. If you don't see this option, you must activate the Now Assist panel. For more information, see [Turn on the Now Assist panel](#).

Select the down arrow to configure the user roles that can access the skill.

Select the arrow near the toggle to select roles that can access the skill. You can add roles by entering the name of the role in the **User roles** field. You can remove existing roles by selecting the **X** icon in the role bubble. You must have at least one role specified, but you can add as many roles as you like.

12. Review your choices and select **Activate** to complete the skill configuration.

The screenshot shows the ServiceNow Now Assist Admin console. The top navigation bar includes 'Overview', 'Now Assist Features', 'Now Assist Experiences', 'Analytics', and 'Settings'. The main content area is titled 'Chat summarization' and shows the 'Review and activate' step. On the left, a sidebar lists steps: 'Define trigger', 'Choose input', 'Select display', and 'Review and activate' (which is highlighted). The main area contains several sections: 'How will it work?' with a description, 'Choose how and when the skill will be triggered' with a table of settings, 'Enabled portals' and 'Enabled channels', and 'Will chat summarization display in product?' and 'Will chat summarization display in Now Assist panel?' with lists of roles.

Choose how and when the skill will be triggered.	
Virtual Agent to Live Agent ha...	true
Quick action:	true
Short description:	true
Chat wrap-up:	true
Bulleted list:	true
Task creation:	true
Live Agent to Live Agent hand...	true

Will chat summarization display in product?	
Yes, for the following roles:	
sn_gsm.agency_agent sn_gsm.agency_constituent_agent sn_gsm.business_agent sn_gsm.constituent_agent	

Will chat summarization display in Now Assist panel?	
Yes, for the following roles:	
sn_esm_agent sn_gsm.constituent_agent sn_gsm.business_agent	

Result

Chat summarization is active and customized for the desired workflow.

What to do next

Review the performance of the Now Assist for PSDS chat summarization skill on the Now Assist Admin console. Learn more about tracking your Now Assist usage at [Monitoring Now Assist usage in Subscription Management](#).

Customize a case summarization skill in Now Assist for Public Sector Digital Services (PSDS)

If you have the admin role, you can customize the case summarization skill in the Now Assist for Public Sector Digital Services (PSDS) application so that government service agents can use the generative AI skills in CSM Configurable Workspace and in the Public Sector Digital Services Core UI.

About this task

Government service agents can use case summarization, powered by Now LLM, to gather context about constituent issues throughout the case's life-cycle. The case summarization skill auto-generates informative summaries that distill key details from work notes, comments, and other case data, which can help agents resolve cases faster.

Note:

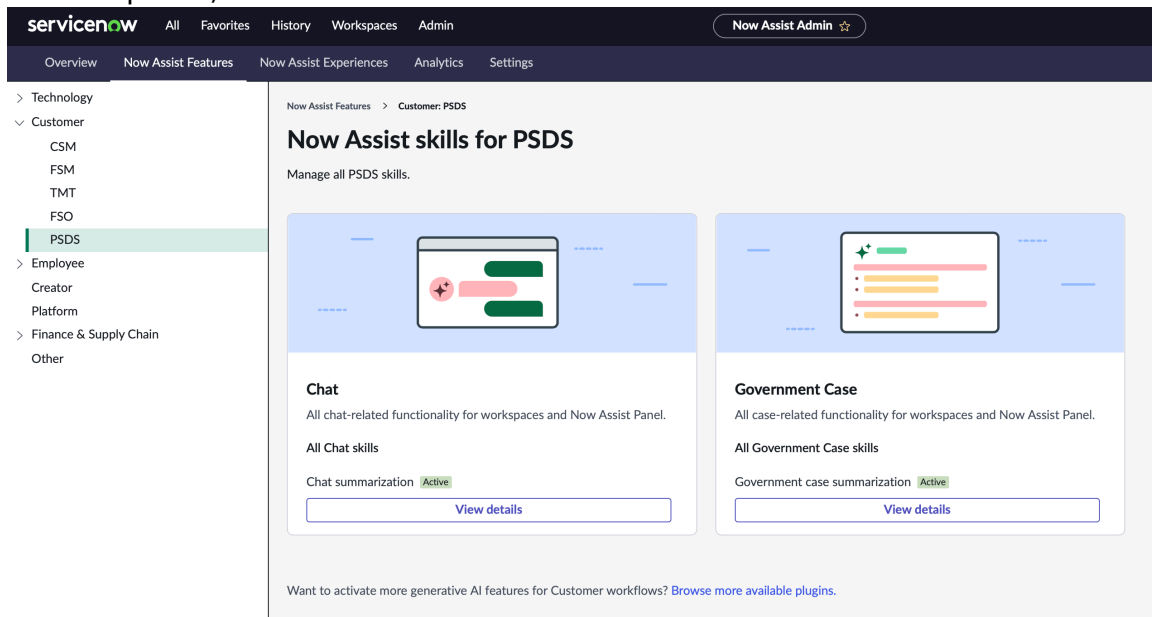
The base system includes a preconfigured case summarization skill.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Now Assist Admin > Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the dropdown, select **Customer > PSDS**.



3. On the Government case feature card, select **View Details**, then select **Case Summarization** under Active Skills.

By default, the case summarization skill is activated for Now Assist for PSDS. If it isn't active, select **Activate Skill** in the All available Chat skills section of the case recommendation card.

4. In the Active skills section, locate the **Government case summarization** skill.

5. Select the More actions icon  for the skill in the Active skills section, and create a copy that you can customize by selecting **Make a copy**.

The copy that you make is listed in the Active skills section.

6. Select the copied skill from the Active skills section to open it.

A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the case summarization skill is activated.

7. In the General details step, fill in the fields.

For information about the inputs and triggers for each skill, see [Skill inputs and triggers for Now Assist for Public Sector Digital Services \(PSDS\)](#).

- a. Enter a name and description for the skill.
- b. Select **Save and continue** to go to the next step.

8. View the input data for each skill, such as the base input fields and related lists for the different input templates (Case new, Case work in progress, and Case resolved states).

Configure the base input table fields and related lists for the different input templates (Case new, Case work in progress, and Case resolved states) for the skill.

Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

Select only those related tables that are offered as the base system, as part of the input data.

- a. For each input template state (New, Work in progress, and Resolved), select **+New base input field** and configure the base input table fields.

Add multiple base input fields, as necessary.

View input step

The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response. For example, Short description.
Field description	Description of the base input field value. For example, Short description of case, provides brief information about the issue.

- b. For each input template state (New, Work in progress, and Resolved), configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

The following table lists the input template states.

Input template states

State	Description
New	State is New.
Work in progress	State is Work in Progress.
Resolved	State is Resolved.

- c.** For each input template state (New, Work in progress, and Resolved), select **+New data source** to configure the additional related table and activity stream data, as needed.

Adding input data sources, like the related tables and activity streams, provide more context to the Now LLM Service in a related list.

You can also add the rule conditions to these additional data sources.

The selection of the related table fields may have a direct impact on the quality of the corresponding prompt header. For example, if a prompt header requires a specific field from the related table, but that field isn't selected as input, the summary for that prompt header will contain missing information. For example, as a base case, you see one related table, such as Service level agreement (SLA), that includes all the required fields and filtering conditions for the prompt header. The SLA prompt header is preselected to help you understand how the related table, its fields, and the prompt header work together to produce a summary. You can use the SLA as a reference to configure the other related tables to determine which fields to select and which description adds the requirements of their respective prompt headers. Apply any additional conditions to filter the data further.

- d.** Select **Save and continue** to go to the next step.

9. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

- a.** For each input template state (New, Work in progress, and Resolved), select the prompt sections from the list of available sections to include in the generated summary.

To add a section, you must configure the relevant input data prior to this step.

The available prompt sections that you can select:

- **Issue**
- **Key Actions Taken**
- **Resolution**

The following table lists the required prompt headers.

Required prompt headers

Input template state	Required prompt header
New	Issue
Work in progress	▪ Issue ▪ Key Actions Taken
Resolved	▪ Issue ▪ Key Actions Taken ▪ Resolution

You can add the **Waiting on customer** prompt to cases only if the case has an **Awaiting info** state. Otherwise, adding this header to other states could cause the Now LLM Service to generate inaccurate or unreliable results.

b. Select **Save** to continue to the test response.

c. Select a case record in the Test response section, and test the prompt response output format by selecting **Run Test**.

d. Select **Save and continue** to go to the next step.

10. Define how the skill is available to your users.

a. Configure the skill to be consistently available to users, or select conditions that must be met before the skill is available.
Selecting **Customize skill availability** displays a condition builder to filter the data further.

b. Select **Save and continue** to go to the next step.

11. Configure where to display the case summarization.

a. Select either **In-product**, or **Now Assist panel**.

- **In-product:** When selected, the Now Assist skills are displayed on the forms and workspaces.

For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

- **Now Assist panel:** When selected, the Now Assist skills are available in the Now Assist panel.

If you don't see this option, you must activate the Now Assist panel. For more information, see [Turn on the Now Assist panel](#) .

For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

b. Select **Save and continue** to go to the next step.

12. Review your choices and select **Activate** to complete the skill customization.

Government case summarization PSDS Exit

Review and activate
Go over the default setup and turn on the skill for agents. [Explain this](#)

General details
View input
Customize prompt
Define Availability
Select display
Review and activate

What data is used as input?
Case new
Input table: Government Service Case
Input fields: Description, Short description, State, Work notes, Additional comments
Case work in progress
Input table: Government Service Case
Input fields: Description, Short description, State, Work notes, Additional comments
Case resolved
Input table: Government Service Case
Input fields: Description, Short description, State, Work notes, Additional comments, Resolution notes

What are the prompt output sections?
Case new
Prompt Sections: Issue
Case work in progress
Prompt Sections: Issue, Key Actions Taken
Case resolved
Prompt Sections: Issue, Key Actions Taken, Resolution

How will it work?
Select inputs into case summaries, how to display the summaries, and who can access them in production. When activated, this skill helps your agents gather context faster

Availability of the skill
Skill is always available

Will government case summarization display in product?
Yes, for the following roles:
sn_esm_agent

Will government case summarization display in Now Assist panel?
No

Skill inputs and triggers for Now Assist for Public Sector Digital Services (PSDS)

Use the inputs and triggers for each skill to configure how and when a skill is used.

Overview of skills and triggers

Depending on the selected skill, you can configure inputs or triggers. These settings determine how and when a skill is used. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a case summary. A trigger initiates an action, such as when the system generates a chat summary.

Chat summarization skill

For the chat summarization skill, select the triggers that determine when a chat summary is generated. You can also select the properties that control how a chat summary is displayed.

The following table lists the triggers that you can configure for the chat summarization skill of the Chat Assist feature.

Triggers for the chat summarization skill

Trigger	Description
Virtual Agent to Live Agent handoff	Chat summary that is generated when the chat handoff is done from Virtual Agent to a live agent.
Live Agent to Live Agent handoff	Chat summary that is generated when the chat handoff is done from a live agent to a live agent.
Quick action	Chat summary that is generated when the live agent performs the <code>/summarize</code> quick action.
Chat wrap-up	Chat summary that is generated when the live agent ends the chat. The Chat Summary field is updated for the interaction.

Triggers for the chat summarization skill (continued)

Trigger	Description
Short description	Short description field that is updated for the interaction when the live agent ends the chat.
Task creation	Short description and Description fields that are auto-populated on the task record when a task is created from an interaction.

The following table lists the inputs for the case summarization skill.

Inputs for the case summarization skill

Input	Description
Chat conversations	Virtual Agent chat conversations are input data by default.
Portals	Portals to use as the source of the input data. You can't deselect the default product portal, and portals that are already in use by other products can't be selected.

The following table lists the property that you can select to control how a chat summary is displayed.

Property for the chat summarization skill

Property	Description
Bulleted list	Chat summary as an unordered list. When this option is set to Off, the chat summary can be viewed in paragraph form.

Case summarization skill

The case summarization skill includes the inputs that identify the table and fields that are used when a case summary is generated.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

The following table lists the inputs for the case summarization skill.

Inputs for the case summarization skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	• Description • Short description • Work notes • Additional comments

Resolution notes generation skill

The resolution notes generation skill includes the inputs that identify the table and fields that are used when the resolution notes are generated for a case.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

The following table lists the inputs for the resolutions notes generation skill.

Inputs for the resolution notes generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	• Description • Short description • Work notes • Additional comments • Email

Using Now Assist for Public Sector Digital Services (PSDS)

If you have an agent role, you can summarize the case details and generate the case resolution notes with the Now Assist for Public Sector Digital Services (PSDS) application.

Summarize the case details to help you understand the case context quicker. These summaries are useful for long-running or complex cases that include multiple conversations between agents and constituents.

Generate the case resolution notes to help wrap up cases faster. When you're ready to propose a solution to a constituent or relay a decision about their application, this feature can generate resolution notes and add them to the Case form. The resolution notes also provide the context about the case resolution to other agents who might encounter similar issues or cases.

Generate a summary of the Virtual Agent chat history and the chat conversation between a live agent and a customer by using the chat summarization skill in the Now Assist for Public Sector Digital Services (PSDS) application.

Synthesize and summarize information from multiple KBs to deliver relevant answers in a conversational format using the Now Assist AI Search for CSM Workspace plugin. This skill provides actionable AI-generated or AI-selected answers to a search in CSM Workspace, and can replace a list of possible findings with a single-turn conversational result.

Skills

The Now Assist for PSDS application includes the generative AI skills that can enable your agents to understand the case context so that they can propose resolutions to the constituent or approve an application faster.

Case summarization

Provides an agent with a summary of a public service case, including the issue and the actions taken. An agent can generate a summary of a case to understand the

case context, refresh the summary so that it includes the latest updates to the case, and post the summary to the case work notes.

The case summarization skill generates a case summary and displays it above the activity stream. The summary includes the information that the agent enters in the following case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Email
- Service level agreement (SLA)

Chat summarization

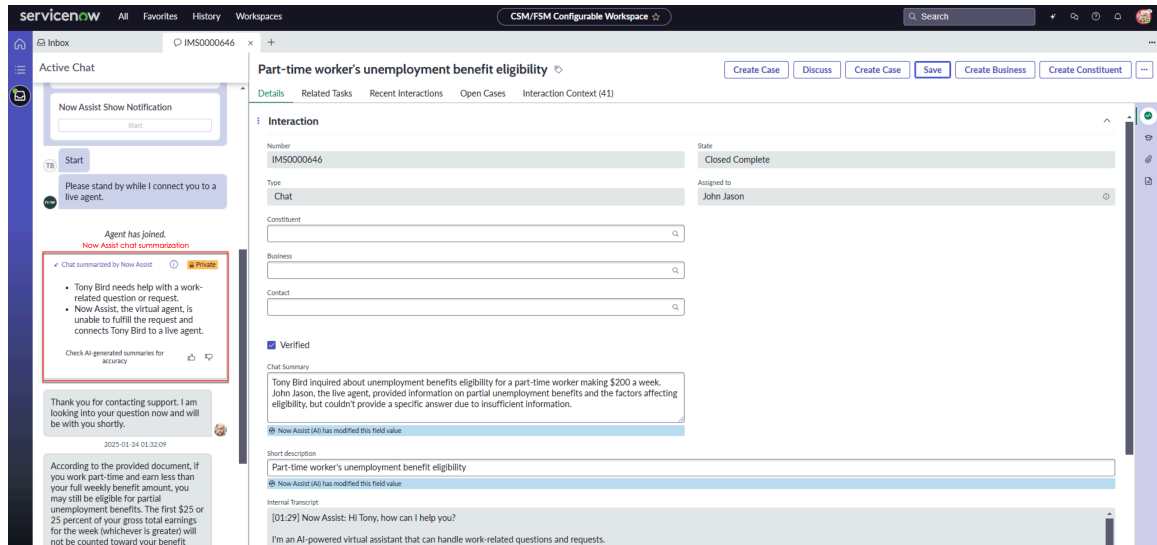
Provides an agent with a summary of a customer's Virtual Agent chat history, live agent chat history, and the interaction history. Agents can view or create the following summaries:

- Virtual Agent chat handoff summary: Summarizes the conversation when Virtual Agent hands off a chat to a live agent and displays the summary in the Active Chat window. An agent can view a summary of the actions that were taken by a customer before engaging with a live agent.
- Live Agent to Live Agent handoff summary: Summarizes the conversation when a live agent hands off a chat to another live agent and displays the summary in the Active Chat window. An agent can view a summary of the actions that were taken by a customer before hand off to another live agent.
- Quick action summary: Provides a summary when an agent uses the / summarize quick action in the Active Chat window.

- Chat wrap up summary: Populates the **Chat Summary** and **Short description** fields on the interaction record when a live agent wraps up a chat with a customer.

Note:

If a chat summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.



Resolution notes generation

Can enable an agent to generate the resolution notes for a case, propose the resolution to the constituent or applicant, and add the information to the case record.

The resolution notes generation skill displays a pop-up window that an agent can use to select a resolution code and review the resolution notes text before proposing a resolution to a constituent or relaying a decision to an applicant.

Note:

The resolution notes generation skill requires a minimum of 200 words in the case record to generate the resolution notes. If the resolution notes can't be generated, the system displays a message below the **Resolution notes** field.

Related topics

[Now Assist](#)

[Install and configure Now Assist for Public Sector Digital Services \(PSDS\)](#)

[Using Now Assist for Public Sector Digital Services \(PSDS\)](#)

Summarize a chat conversation using Now Assist for Public Sector Digital Services (PSDS)

Generate a summary of the Virtual Agent chat history and the chat conversation between a live agent and a customer using the chat summarization skill in Now Assist for Public Sector Digital Services (PSDS).

About this task

Agents can utilize chat summarization, powered by Now LLM, to gain contextual understanding of support issues throughout a chat's lifecycle, even if it involves virtual agent interactions, transfers to live agents, or multiple hand-offs between agents.

In a Virtual Agent conversation, when a requester chooses to connect to a live agent, a chat interaction appears in your inbox. When you accept the interaction, a summary of the Virtual Agent conversation is generated. You can request more details from the requester to resolve the issue.

You can also summarize the chat interaction when the chat ends or when an incident is created for further troubleshooting before or after the chat ends. The summary includes all points of the handoff, including the Virtual Agent conversation, and provides a context of the interaction to you and the other agents who might want to refer to it.

The chat summarization skill enables you to do the following actions:

- Summarize the Virtual Agent chat history and provide a summary of the actions taken by the customer before the customer engages with a live agent.
- Summarize the live agent and customer chat history, including the actions taken by the customer before the live agent hands off the call to another live agent and the customer engages with the new agent.
- Summarize the chat at any point during the conversation using the `/summarize` quick action.
- Summarize the chat between a live agent and a customer when a chat is handed off to another live agent or when an agent wraps up the conversation and ends the interaction.

Note:

You can also generate a chat summary on demand from the Now Assist panel. For more information, see [Chat summarization](#).

The chat summarization skill updates the Short description and Chat Summary fields on the interaction record once the chat is ended.

Before you begin

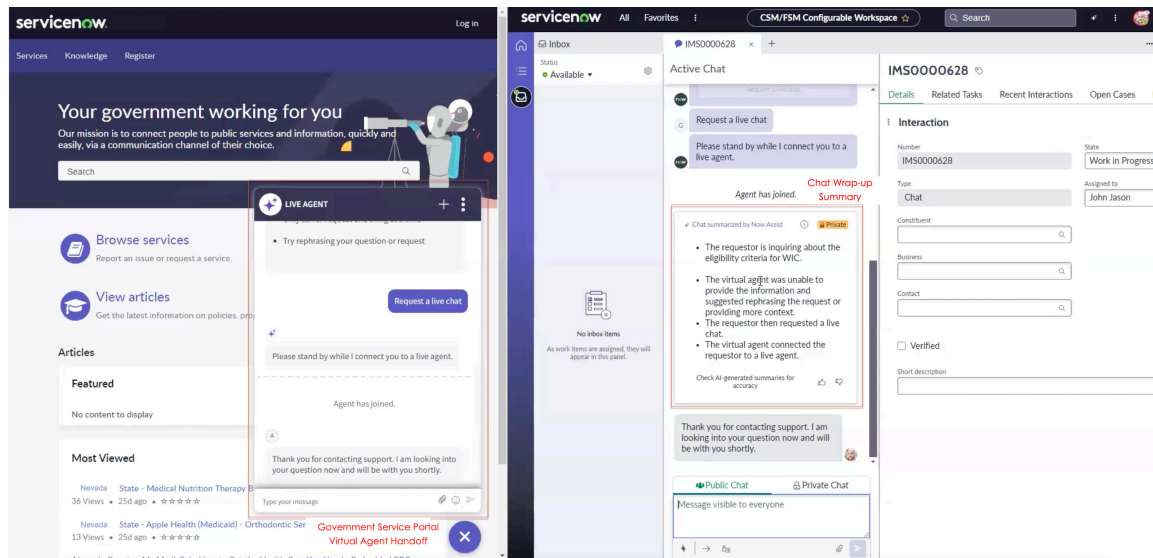
Role required: admin

Procedure

1. Navigate to **Workspaces** > *CSM Configurable Workspace*.

2. In CSM Configurable Workspace, open a chat from your inbox.

The chat summarization skill automatically creates an inline summary in the Active Chat window. This summary includes the constituent's issue, the interaction with the Virtual Agent, and any actions the constituent has taken before engaging with a live agent. This summary appears in the Active Chat window and is identified by the Now Assist icon (✦) and the **AI chat summary** label.



3. **Optional:** Provide feedback for the chat summary by selecting the helpful icon (👍) or not helpful icon (👎) on the summary card.
This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
 4. Chat with the customer to get any additional details about their question or issue.
For example, if an applicant is applying for a benefit program, you may need to collect additional information from what they provided the Virtual Agent.
 5. In the Active Chat window, use the /summarize quick action to summarize the chat during the conversation with the customer.
The chat summarization skill creates an additional inline summary in the Active Chat window. This is helpful if you want to summarize long or detailed customer conversations.
 6. **Optional:** If Live Agent to Live Agent handoff is enabled, transfer a chat to another agent after accepting an incoming chat with the following steps:
 - a. Select the Transfer to Agent icon  to transfer the interaction to another agent.
 - b. Select the name of another live agent.
 - c. The second live agent selects **Accept** to join the chat.
Another summary of the chat is created when the conversation moves from one live agent to another live agent.
 7. End the chat conversation by selecting **End Chat**.
The chat summarization skill updates the **Short description** and **Chat Summary** fields on the interaction record once the chat is ended.
- Note:**
If a chat summary isn't available for the interaction, the **Chat Summary** field does not appear on the interaction record.
8. Review the text in the **Short description** and **Chat Summary** fields to ensure accuracy, and make any necessary corrections.
 9. Select **Save**.

Summarize a case using Now Assist for Public Sector Digital Services (PSDS)

Generate a summary from the fields that you selected on the case record to help you quickly understand the case context by using the case summarization skill in the Now Assist for Public Sector Digital Services (PSDS) application.

About this task

Government service agents can utilize case summarization, powered by Now LLM, to gain contextual understanding of constituent issues throughout the case's lifecycle. The case summarization skill auto-generates informative summaries that distill key details from work notes, comments, and other case data, which can help agents resolve cases faster.

The case summarization component appears below the activity picker component on the playbook page templates, and is collapsed by default. When an agent generates a case summary by selecting **Summarize**, the component expands to display the summary information, including a description of the issue, the actions taken, and the next steps. For longer summaries, select **View more** and use the scroll bar to view the content.

The chat summarization skill enables you to do the following actions:

- Select Summarize to create a summary of the case details.
- Select Share to work notes to copy the summary text to the activity stream.
 - Review the summary text in the Share to work notes pop-up dialogue and modify the text as needed.
 - Select Save to work notes on the pop-up dialogue to add the text to the activity stream.
- Select the refresh icon in the component footer to refresh the text and get the latest summary.

After generating a summary, you can:

- Review the summary information and edit as needed.
- Provide feedback on the generated summary.
- Add the summary information to the case work notes.
- Copy the summary information to the clipboard.

Note:

You can also generate a case summary on demand from the Now Assist panel. For more information, see [Record summarization](#) .

Before you begin

Role required: admin

Procedure

1. Open a government service case by navigating to Lists in the CSM Configurable Workspace.
2. In the Case summary by Now Assist component, select **Summarize**.

Note:

The Case summary by Now Assist component appears above the constituent card. Generating and displaying the summary may take several seconds. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

Case record with case summary

The screenshot displays the ServiceNow Case record interface for 'Nutrition Assistance - Jerry Rice'. The interface includes a navigation bar with tabs for Intake, Review, Process, and Decision. The 'Review' tab is active. On the left, there's a sidebar with 'Activities' (Review Application, Check for duplicate benefits, Verify supporting documentation, Conduct interview) and a 'Case summarized by Now Assist' section. The 'Case summarized by Now Assist' section is highlighted with a red box and contains a 'Share to work notes' button. The main content area shows 'Check for duplicate benefits' with a table of similar requests. The table has columns for Number, Date submitted, Service, State, and Reported by. The first row is 'SBC0001026' with 'Date submitted' '2024-06-05 17:18:55' and 'State' 'Under Evaluation'. The second row is 'SBC0001008' with 'Date submitted' '2024-05-31 23:30:48' and 'State' 'Under Evaluation'. The third row is 'SBC0001003' with 'Date submitted' '2024-06-05 16:40:45' and 'State' 'Under Evaluation'. Below the table, there's a 'Notes' section with a 'Work notes list' and a 'Work notes' input field. The 'Work notes' input field is empty. The 'Additional comments (Customer visible)' input field is also empty.

3. Optional: When you're finished summarizing a case, you can add it to the case work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Using AI Search in Now Assist for Public Sector Digital Services (PSDS)

Agents can search for information with single turn Q&A using the AI Search feature in Now Assist for Public Sector Digital Services (PSDS).

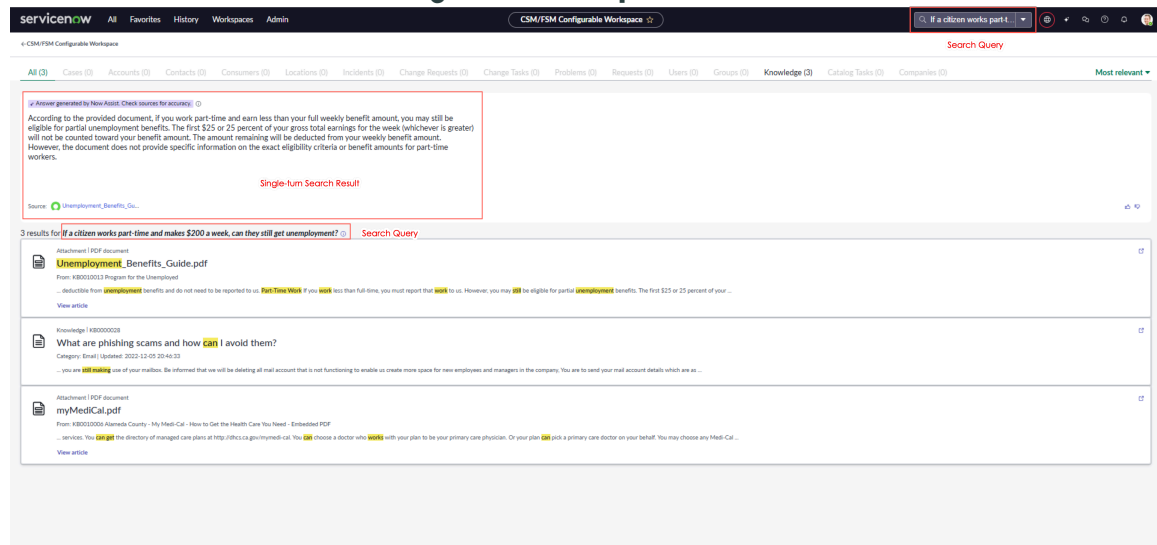
The Now Assist in AI Search application uses Now LLM Service to extract actionable Q&A Genius Result answers from the knowledge articles that are found in the Service Portal, Virtual Agent, Employee Center, and global searches. By using this application, an agent can improve the customer's experience by retrieving the relevant content from the knowledge base and generating concise answers. For more information, see [Now Assist in AI Search](#).

Legislation summarization

The Now Assist AI Search for CSM Workspace plugin synthesizes and summarizes information from multiple knowledge bases to deliver relevant, actionable AI-generated or AI-selected answers to search queries in a conversational format.

Agents can use AI Search to pose a query directly in the search bar in the CSM Configurable Workspace, which will then generate an answer to their question by parsing and summarizing content from one or more knowledge bases. This single-turn, conversational search result replaces a long list of possible matches, and can help improve agent response accuracy and relevancy by allowing agents to review a summary of relevant content before responding to customers.

Generative AI Q&A in CSM Configurable Workspace



Search configurations

A search application configuration specifies the search engine and the settings to use for search in a ServiceNow AI Platform application. The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CSM Configurable Workspace store app. To access this configuration, navigate to **AI Search > Search Experience > Search Applications**.

An admin can define and customize the source tables and knowledge bases that the Now Assist AI Search indexes data from by customizing the search profiles within the search application configuration for Now Assist for Public Sector Digital Services (PSDS).

For more information on search application configurations, see [Search application configurations](#). For more information on how to set up and customize AI Search for use with Now Assist for Public Sector Digital Services (PSDS), see [Enabling and configuring AI Search with Now Assist for PSDS](#).

Using agentic workflows in Now Assist for PSDS

Automate the process of synthesizing similar information requests, associated fees, and apply those fees to cases using the **Help manage public information requests** agentic workflow, as part of the Public Sector Digital Services AI Agent Collection application.

The following table lists the skills and agents associated with this workflow. These AI agents work to arrive at a subtotal fee estimate, a recommendation for whether a fee waiver request should be approved or rejected, and a total fee estimate with the fee waiver, if applicable.



Important:

In the **Define availability** screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

Available workflows for Public Sector Digital Services AI Agent Collection

Agentic Workflow name	Description	Available AI agents
Help manage public information requests	- Analyzes fee waiver justification from applicant for an information request case record, and validates justification against predefined rules - Outlines the steps required to estimate the fees associated with an information request - Retrieves similar case records and allows user to exclude any from the fee calculation - Estimates and communicates fee breakdown associated with an information request case record based on similar request queries and request details from the user - Communicates sub-total estimate, fee waiver recommendation, and total with fee waiver.	- Information Request Playbook Fee Estimation Agent - Information Request Playbook Fee Waiver Review Agent

Looking for an AI agent?

- There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available on your instance, see [Find AI agents](#).
- To find agents that might not be installed on your instance, visit the [AI Agent Marketplace](#) on the ServiceNow Store.

Note:

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in to define which options are available, then set the skill-level preferences in the [Now Assist Admin console](#). For more information, see .

Enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see [Implement access control in Now Assist AI agents](#).

i Important:

By default, all agent workflow and AI agent records are read-only.

To run the AI agents autonomously, you must first [duplicate the agentic workflow](#), and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. The triggers for each agentic workflow must be unique. If you prefer to invoke it manually, activating the trigger isn't necessary.
- Azure OpenAI is recommended for ITSM agentic workflows. For information on Large Language Models (LLMs) for AI agents and agentic workflows, see [Select the LLM for AI agents and agentic workflows](#).

Related topics

[Public Sector Digital Services AI agent collection Help manage public information requests workflow](#)

Public Sector Digital Services AI agent collection Help manage public information requests workflow

Use the **Help manage public information requests** agentic workflow to generate an estimated fee breakdown for an information request case, or to determine whether a fee waiver should be granted.

You can use the **Help manage public information requests** agentic workflow to:

- Estimate fees for information request case records by analyzing past cases and user input.
- Analyze requests to waive the fees associated with an information request case.

This feature will estimate fees for information request cases by comparing similar case records and creating the estimate on those records, and calculating an estimate based on labor variables entered by the user. It then compares the requester's fee waiver justification against predefined criteria to recommend whether a fee waiver applies to the case.

AI agents used in the Help manage public information requests workflow

The AI agents used for the **Help manage public information requests** agentic workflow are as follows:

Help manage public information requests workflow

AI Agent name	Description
Information Request Fee Estimation AI Agent	Estimates and communicates the fee breakdown for an information request case record using similar request queries and details input by the user.
Information Request Fee Waiver Review AI Agent	Analyze and validate the fee waiver justification for an information request case record against a set of predefined rules from an external source and explain whether the request should be approved or rejected.

To use the **Help manage public information requests** agentic workflow, you must confirm or perform the following:

1. The Now Assist for Public Sector Digital Services (PSDS) plugin (sn_psd_gen_ai) plugin is installed and configured.
2. Navigate to **All > Now Assist admin > Skills > PSDS**. On the Now Assist Experience tab, verify the Now Assist panel for users is turned on.

For more information, see [Install and configure Now Assist for Public Sector Digital Services \(PSDS\)](#).

To access the **Help manage public information requests** agentic workflow:

1. Navigate to **All > AI Agent Studio > Overview**.
2. Select **Help manage public information requests**.

To modify the agentic workflow, [duplicate it](#)  by selecting the duplicate () icon, and adjust the settings according to your requirements. You can activate the duplicated agentic workflow template by making triggers active and setting the display settings to include the Now Assist panel.



Important:

When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Roles required to activate and access the workflow

The roles required to activate and access the workflow are as follows:

Roles and responsibilities

Roles	Responsibilities
PSDS AI admin [sn_gsm_ai_agents.admin]	• Configure the agentic workflow. • Change AI settings. • Create and manage new workflows and AI agents. • Access and update Autonomous AI Assistant tables.
PSDS AI agent [sn_aia_agent]	Read, create, update, and delete records in the AI agent table.
PSDS Information Request Manager [sn_gsm_info_req.manager]	Receive output from the AI agents.

Activating the agentic workflow

To activate the agentic workflow, perform the following steps:

1. Navigate to agentic workflow **Help manage public information requests** and duplicate it. It duplicates any triggers associated with that agentic workflow.
2. Navigate to the duplicated workflow and activate the trigger **Information Request Fee Estimation and Review is created or updated**.