HOW TO: SUBMIT A TRAINING REQUEST THROUGH JIRA

Use the following link: https://workplaceoptions.atlassian.net/servicedesk

- ❖ **Click on "Show More (7)"**
- ❖ **Click on "Client Training"**
- ❖ **Click on "US Client Training"**
- ❖ *Complete the Client Training form*
- ❖ **Name of EAP Event is Offered Through?**
  - o Deer Oaks
- ❖ **Are you the EAP Account Manager?**
  - o Always select "I am not the EAP account manager"
- ❖ **If you are the EAP account manager, what is the EAP phone number, number of sessions, and website login to be listed on the EAP slide?**
  - o Leave this field blank
- ❖ **Please complete the following fields**
  - o Your Name
  - o Your Phone Number
  - o Company Name(s)
- ❖ **Type of industry**
  - o Government, ISD, etc..
- ❖ **Street address where event will occur**
- ❖ **Are you the primary contact person for the training location?**
  - o Please select "Yes" or "No"
- ❖ If you are not the primary contact person, please list the name, email address and phone number of the primary contact person
- ❖ **Security, parking, logistics of training location**
  - o Please include specific location pertaining to training location
- ❖ **Training location equipment available**
  - o Please advise if computer and projector is available

- ❖ **Should presenter bring thumb drive with training?**
  - o Always select "Yes"
- ❖ **Estimated number of trainees**
- ❖ **Title of training**
- ❖ **Format of training**
  - o On-site Seminar
  - o Webinar
  - o EAP Orientation- On-site
  - o EAP Orientation- Webinar
- ❖ **Date of training**
  - o Minimum of 4 weeks noticed is recommended
- ❖ **Time of training**
  - o In hour increments
- ❖ **US time zone**
- ❖ **Length of session needed**
- ❖ **Name of preferred presenter(optional)**
- ❖ **Are you open to alternate dates & times if the preferred presenter is not available?**
  - o Please select "Yes" or "No"
- ❖ **Please list alternate dates & times (optional)**
- ❖ **Language**
  - o Please select from the dropdown box

❖ **Are there any announcements, situations or recent events that would be helpful for the trainer to know about which spurred this request for training? (optional)**
  o You may add announcements here
❖ **By checking this box, you agree that should this event be cancelled, you will provide at least a 7-business days' notice by accessing this request, noting that the training need has been cancelled.**
  o Check small box to continue
❖ **Email confirmation to**
  o Enter your email address here
❖ **Click Create button**
❖ **You will receive a CAPTCHA picture test**
❖ **The acknowledgement page will soon follow:**
  o Your reference number (i.e. CT-17). Check (email address you have submitted) for a confirmation and updates.
❖ **Check email for communication from "Client Training."**
❖ **Click on "View Request"**
❖ **Sign up to view or comment on the request**
  o For security, we'll send a private sign up link to (email address you have provided)
❖ **Click on "Send link" button** (If you already have an account, you may log in from this page)
❖ **Check your email to finish signing up. (**If you have not received the email, please click "resend" button)

❖ **Follow the link to finish signing up to the Help Center. For security, don't share the link with anyone.**

❖ **Sign up**
  o Email address already populated
  o Enter full name
  o Choose a password
  o Click "Sign up" button

❖ **From the details page, you may "share" the ticket with whom you would like by simply adding their email address.**