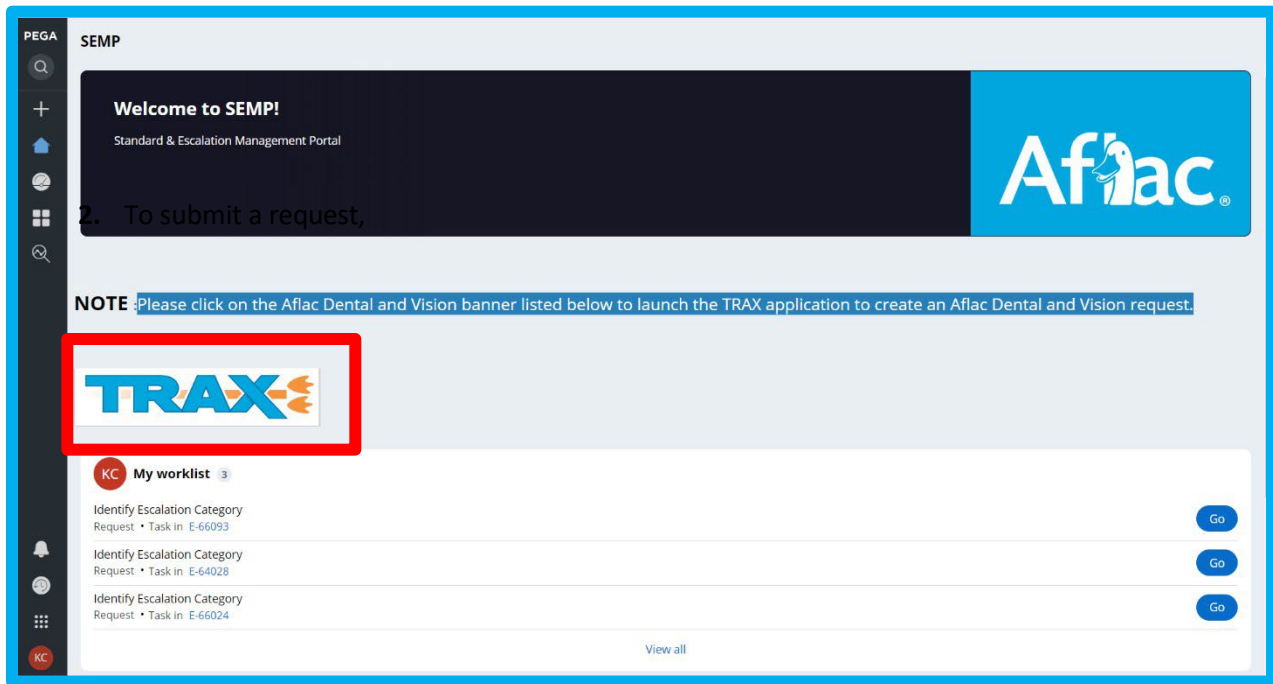


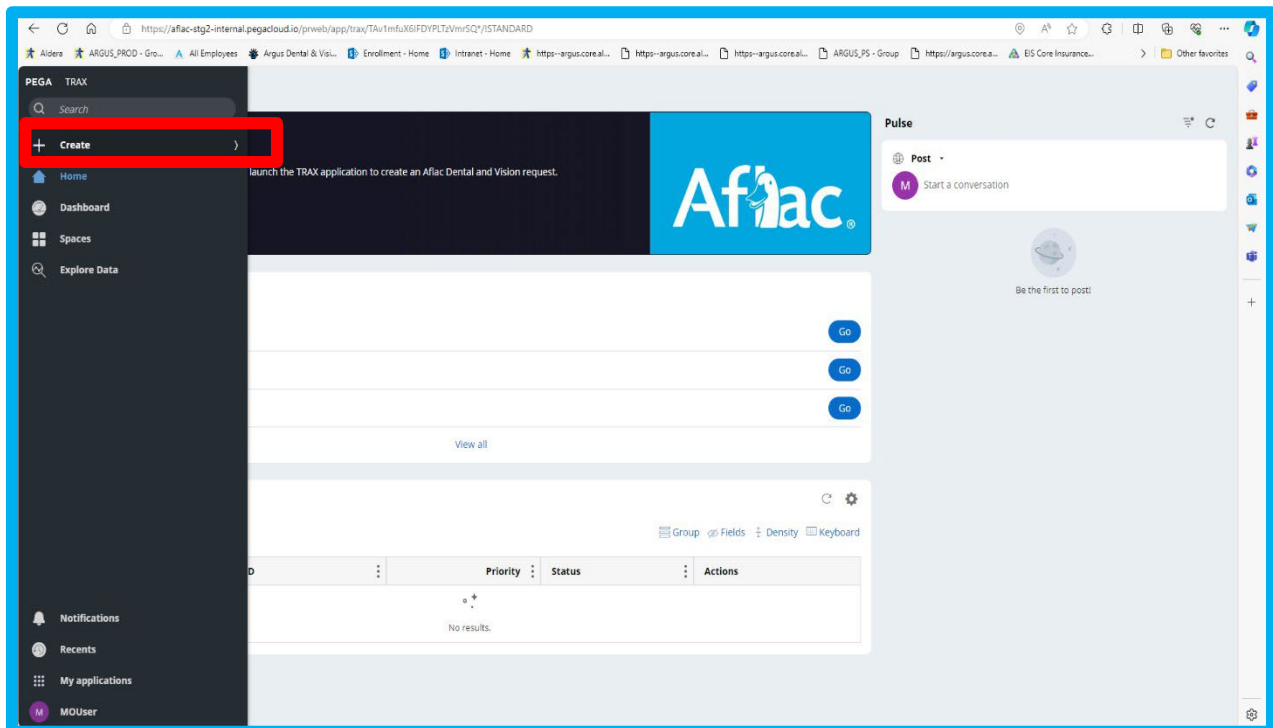
Training Reference Document: TRAX

1. Sign into TRAX by going to Field Force Services → Training & Resources → Producer Growth Training (Header) → Standard & Escalation Management Portal (Lefthand pane) → Standard & Escalation Management Portal (Middle under helpful links) → SEMP Page → TRAX Banner

[SEMP Link](#)

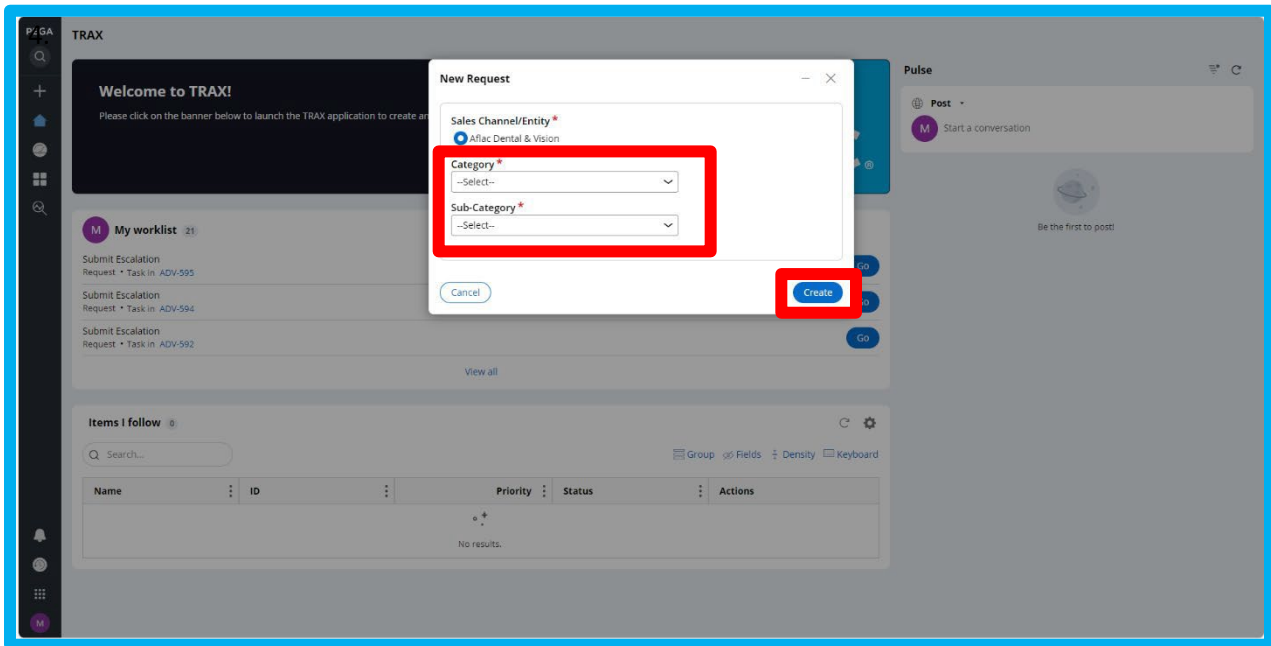


2. To create an escalation request hover over the left-hand pane and select “**Create.**”



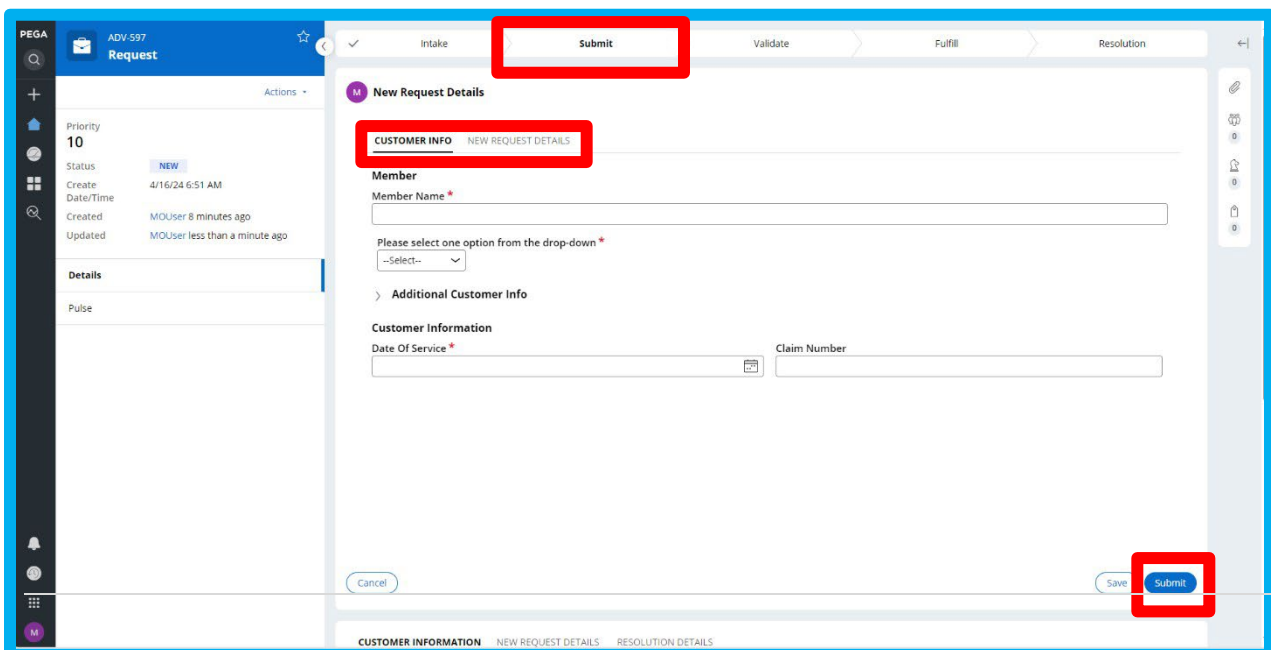
Training Reference Document: TRAX

3. You will be prompted to select a “**Category**” and “**Sub-Category**”. Please refer to the document for more details surrounding these topics. Once a Category and Sub-Category is selected, click “**Create**.”



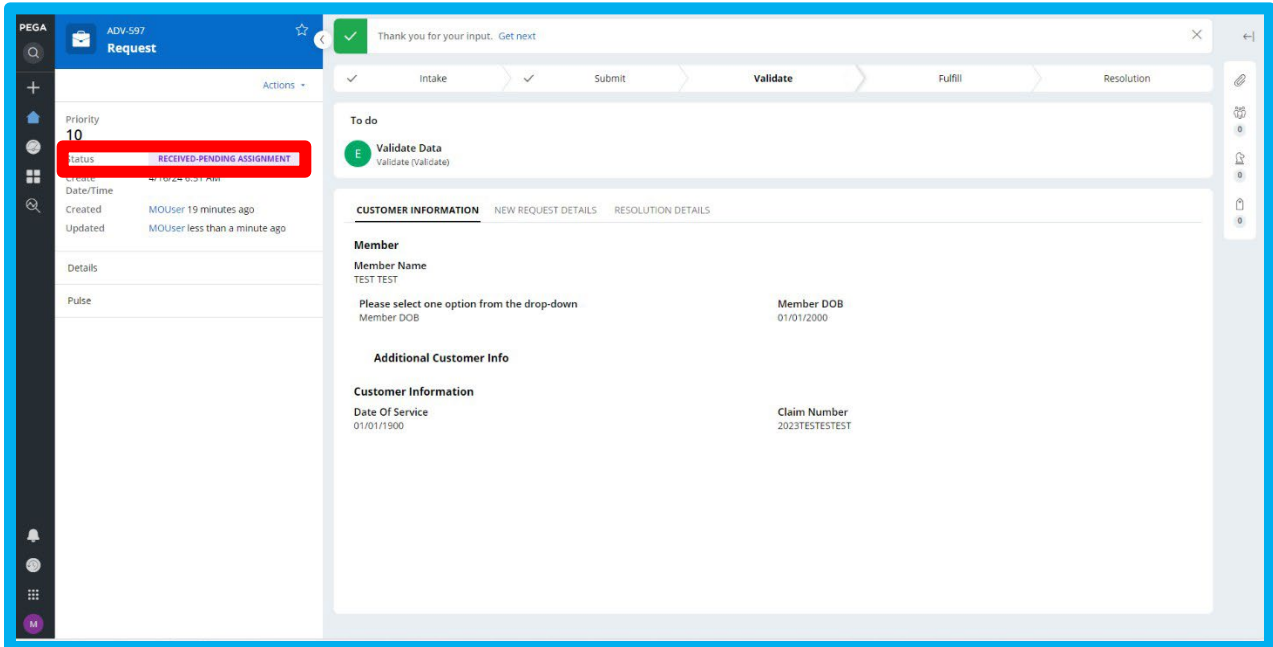
4. You will be brought to the Submit tab which will allow you to input information regarding your escalation request. Please refer to the “**Producer Training Workbook**” document for more details surrounding these topics and what information may be required to process your request. Any field with an “**asterisk**” is required to be filled out. Please ensure the “**Customer Info**” tab and “**New Request Details**” are filled out.

5. Once all required details have been input, select “**Submit**.” You will be sent an email notification when your request has been created.

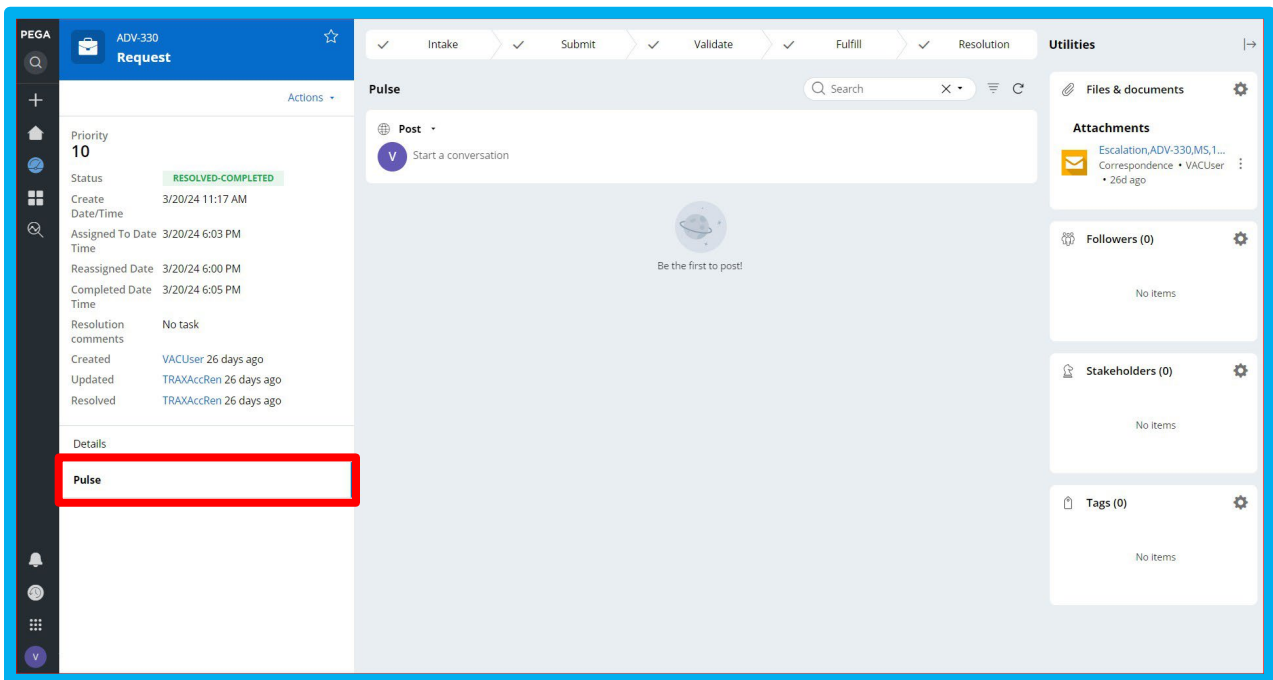


Training Reference Document: TRAX

6. Once you have submitted your request, the status of the request (which can be located in the left-hand pane of the request) will change to **“RECEIVED- PENDING ASSIGNMENT”**. Which means your request has been created and is pending assignment to be worked. You will receive an email notification advising of this. Other statuses and their definitions can be located on the **“Producer Training Workbook”** document.

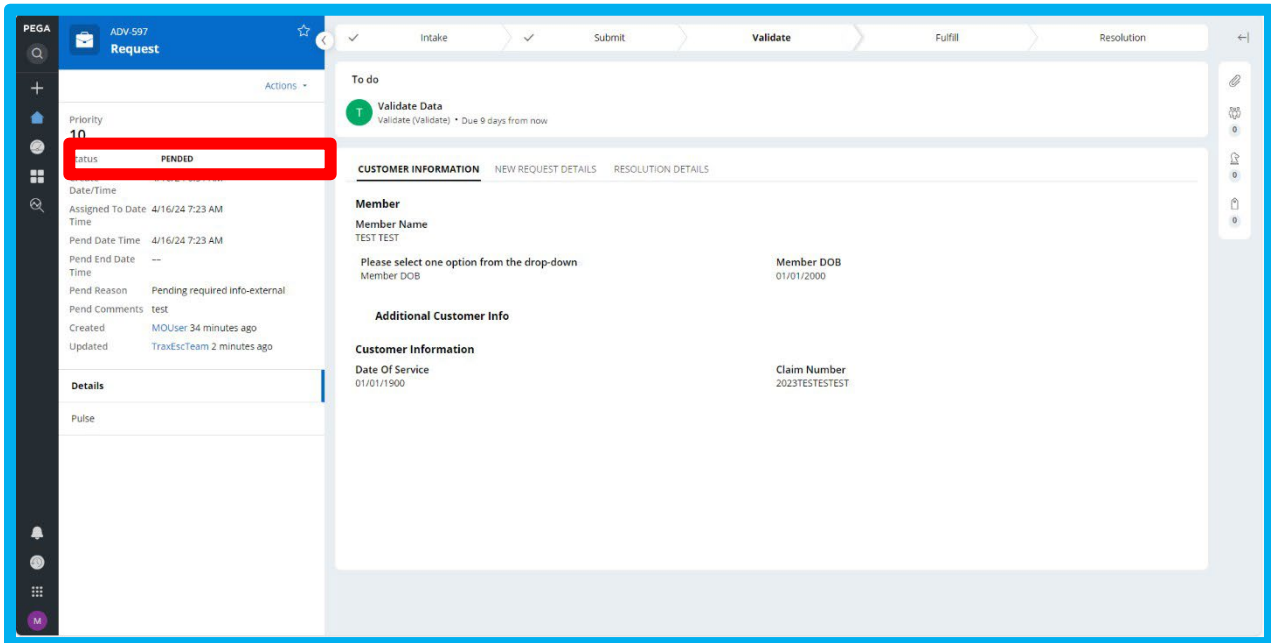


7. To request updates on your escalation request, please utilize the **“Pulse”** tool. This can be found located on the requests left-hand pane.



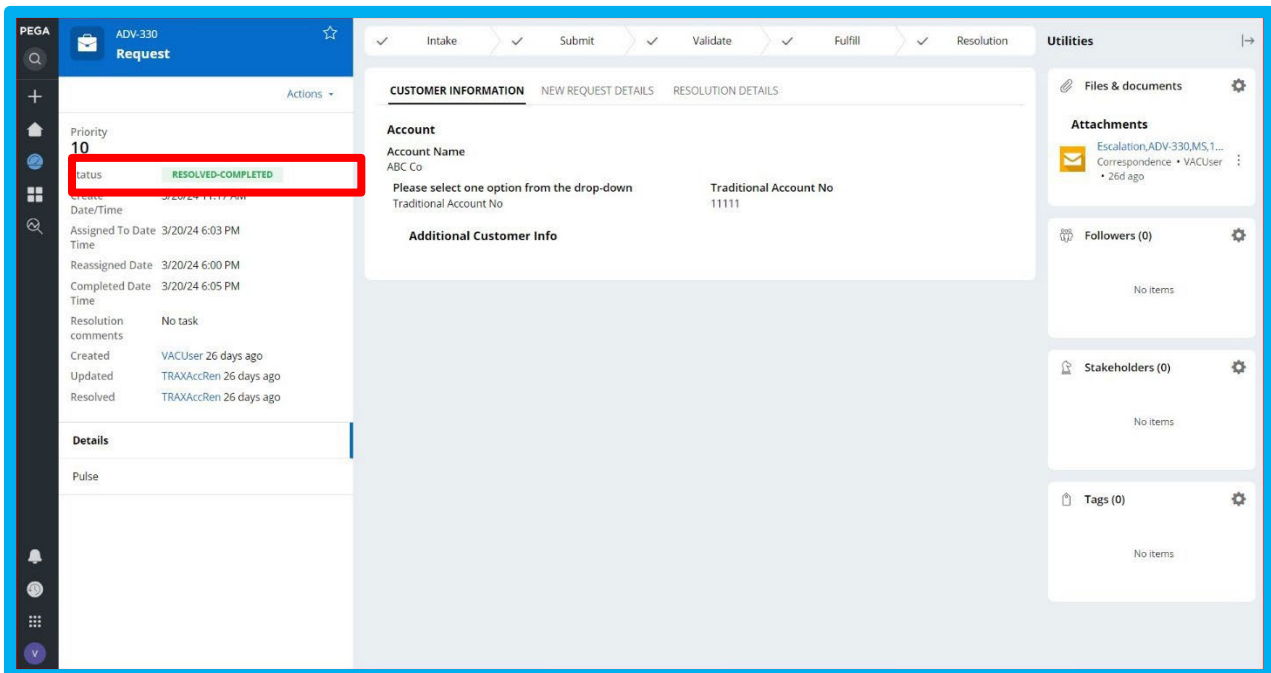
Training Reference Document: TRAX

8. When your request is reflecting as “**PENDED**” that means either we are needing more information regarding the request in order to resolve or the request is pending resolution by our IT Partners. You will receive email notification of this.



The screenshot displays the PEGA Request interface for request ADV-597. The status is 'PENDED', highlighted with a red box. The interface includes a navigation bar with steps: Intake, Submit, Validate, Fulfill, and Resolution. The main content area shows 'CUSTOMER INFORMATION' with fields for Member Name (TEST TEST), Member DOB (01/01/2000), Date Of Service (01/01/1900), and Claim Number (2023TESTESTEST). A 'To do' list at the top indicates a task to 'Validate Data' due in 9 days. The left sidebar shows the request details, including priority (10) and creation/update times.

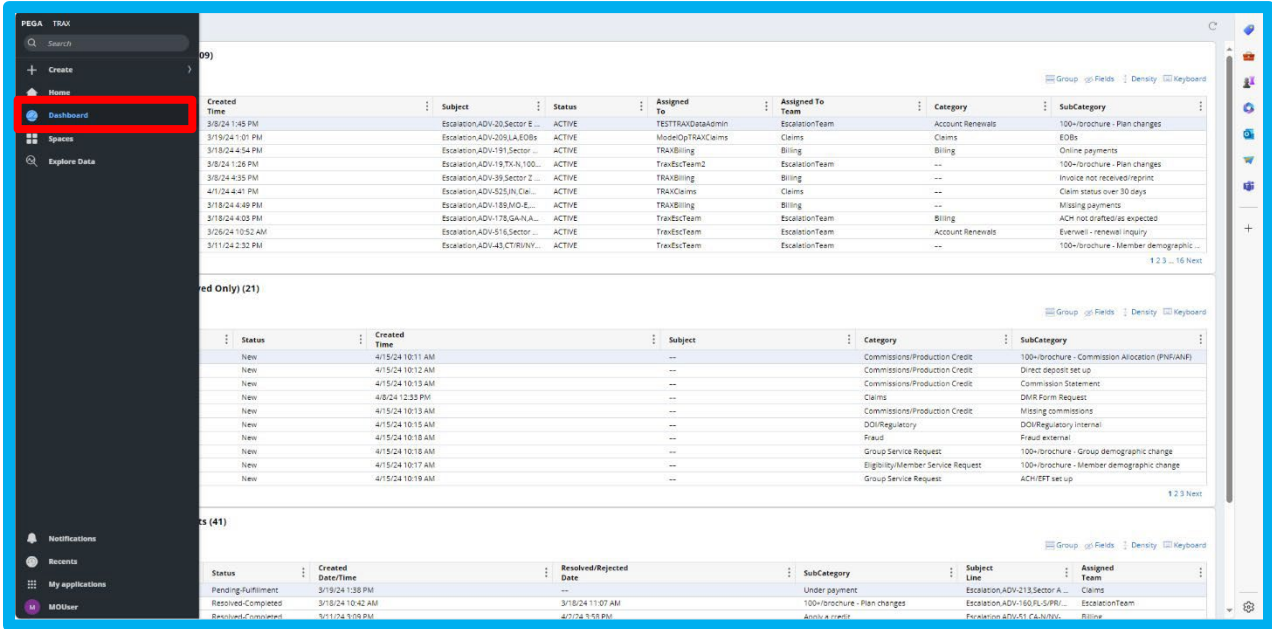
9. When your request has been resolved, the status will reflect as “**RESOLVED-COMPLETED**” you will also receive email notification of the resolution.



The screenshot displays the PEGA Request interface for request ADV-330. The status is 'RESOLVED-COMPLETED', highlighted with a red box. The interface includes a navigation bar with steps: Intake, Submit, Validate, Fulfill, and Resolution. The main content area shows 'CUSTOMER INFORMATION' with fields for Account Name (ABC Co), Traditional Account No (11111), and Traditional Account No (11111). The left sidebar shows the request details, including priority (10), creation time (3/20/24 11:17 AM), and completion time (3/20/24 6:05 PM). The right sidebar shows utility sections for Files & documents, Attachments, Followers (0), Stakeholders (0), and Tags (0).

Training Reference Document: TRAX

10. A complete view of all request and statuses can be located on the **“Dashboard”** tab within TRAX.



11. You will be able to view **“Open Submitted Requests”**, **“Requests not Submitted (Saved Only)”** and **“Completed/Rejected Requests.”**

