

Southland Benefit Solutions eases certification with Issuetrak

business challenge

With hundreds of thousands of covered lives, Southland Benefit Solutions processes thousands of claims each month – usually within 10 days. An IT team of three is responsible for keeping the technology running for 60 employees across two locations in the Southland family of companies.

If an employee can't log in or access a program, it impacts productivity and customer service. Until recently, the IT department managed all IT help desk issues through Microsoft Outlook. Using an email program made it impossible to find the status of anything quickly.

"With Outlook, we had to search for issues by subject or date to find a current status," said Craig Stewart, technology manager. "We couldn't assign anything or report on what's open or closed. It wasn't a good way to manage support requests or projects."

solution

Stewart and the IT team evaluated various help desk solutions before choosing Issuetrak, which Stewart had used in a previous position. Issuetrak provided the help desk and workflow requirements for regular IT needs and a

change management infrastructure for SOC audits.

"Issuetrak was the best fit for us," he said. "The screens were simpler to understand and it was customizable. Cost was also a benefit."

Southland deployed the on-premises version with remote support from Issuetrak. With documentation, the company performed its own customization and was up and running in less than a week. Issuetrak integrates with Southland's Active Directory, making it fast to set up employee accounts.

"As part of our SOC 2 audit, we had to implement new processes, Issuetrak gives us the change management controls and documentation we need for certification."

*-Craig Stewart
Technology Manager*

In Issuetrak, Southland keeps up with everything from simple password resets to tasks with multiple steps, such as setting up a new computer for an employee or approvals



for IT purchases. The solution provides complete workflow management capabilities to ensure tickets are assigned to a team member, tracked and addressed through resolution.

Employees still submit requests the same way they always have: with an email to the IT team. But now those emails automatically create a help desk ticket ready for the team to address. Employees automatically receive an email confirmation with the ticket number so they know it's being addressed. Automation also kicks off emails to the team if a ticket has been open for a certain amount of time.

For SOC 2 certification, Issuetrak keeps up with the steps and documentation required for change management. Change requests and documentation are tracked using customized tickets and task lists, and the current version of each documentation template is available from the Issuetrak Knowledge Base.

Outside of IT, the operations team also uses Issuetrak to check off the tasks required to set up a new customer.

Southland builds a database of information on the help desk, operations and change management that is reportable, giving them essential feedback to improve service. They look at resolution times, types of issues, and lists of changes that need approval.

benefits

Previously, Stewart spent a couple of hours every Monday combing through Outlook for new, open and closed issues to create reports manually. Now, anyone on the team can instantly generate reports with this information and much more based off of the data in Issuetrak. The automation within Issuetrak keeps customers informed and tickets moving toward resolution, making for happier employees.

about Issuetrak

Issuetrak helps keep important business issues and tasks from falling through the cracks! We provide our customers with reliable and intuitive software for tracking, assigning, and reporting on internal and external issues and requests. Issuetrak includes a powerful process management component for streamlining workflows, and ensuring approvals are obtained and procedures followed. Founded in 1992 and based in Norfolk, VA, Issuetrak is a leader in developing issue tracking, complaint management, workflow, and help desk solutions. Our customer span nearly all industries, and many use Issuetrak across their entire organization.

