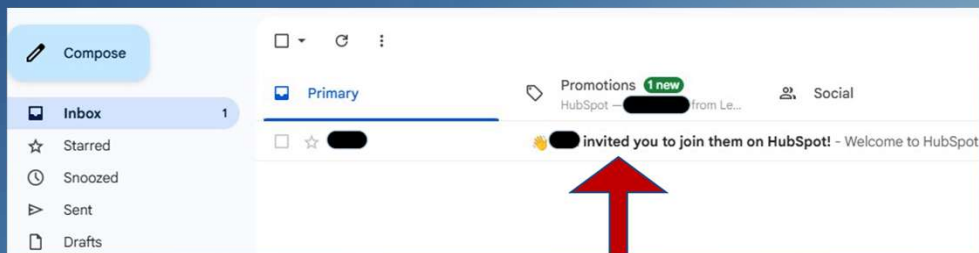




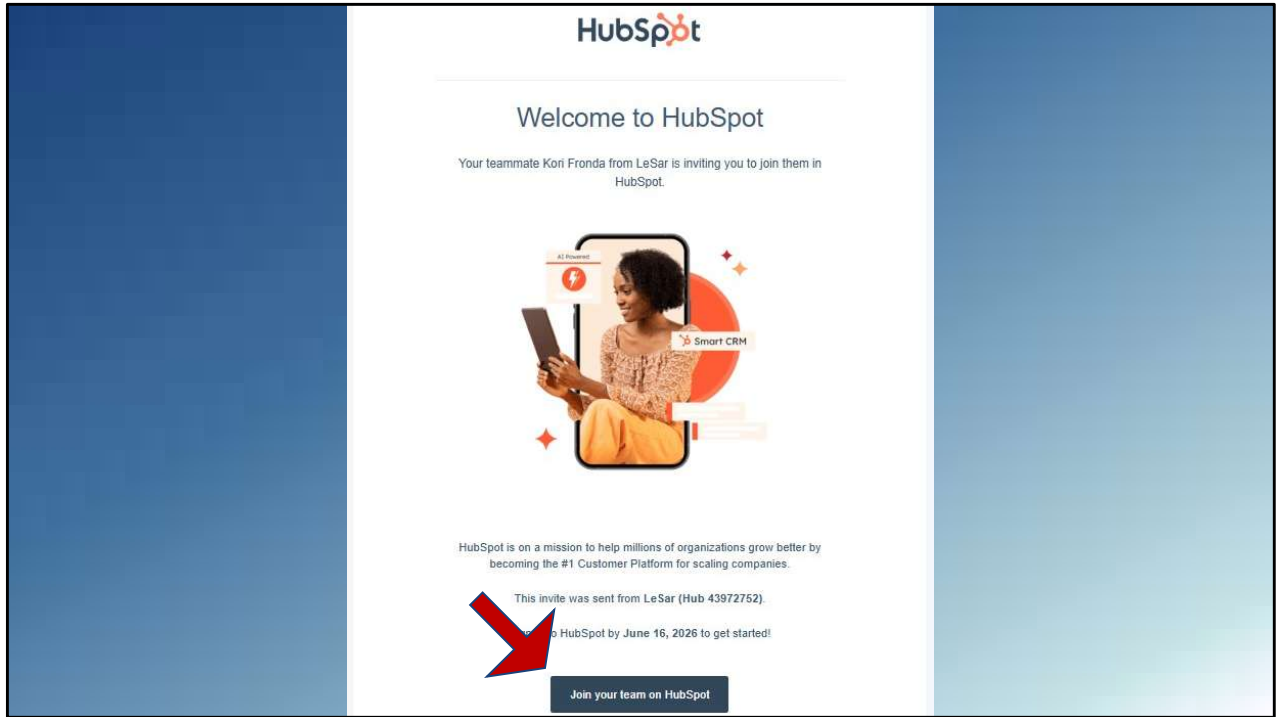
Initial Registration and Ticket Walkthrough

Enhanced Transition Support

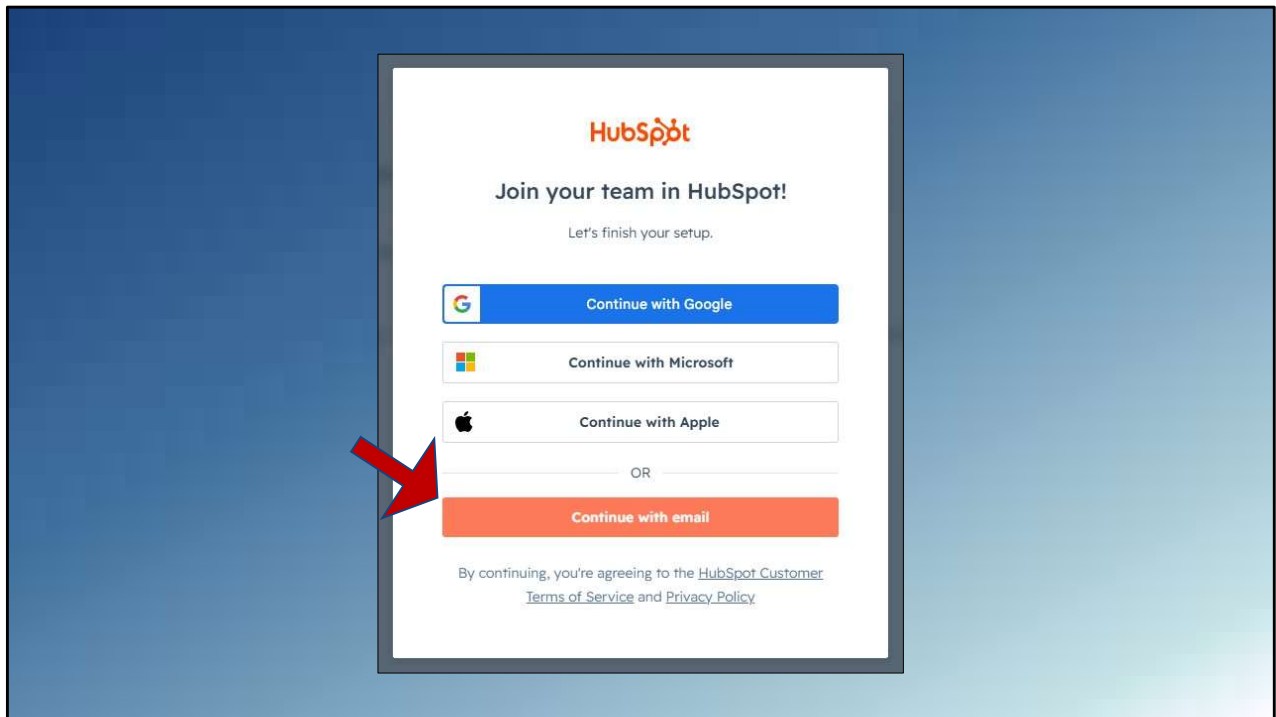
Hello, LeSar Housing Support Staff here to help walk you through the Funding Portal Initial Registration and Ticket Process.



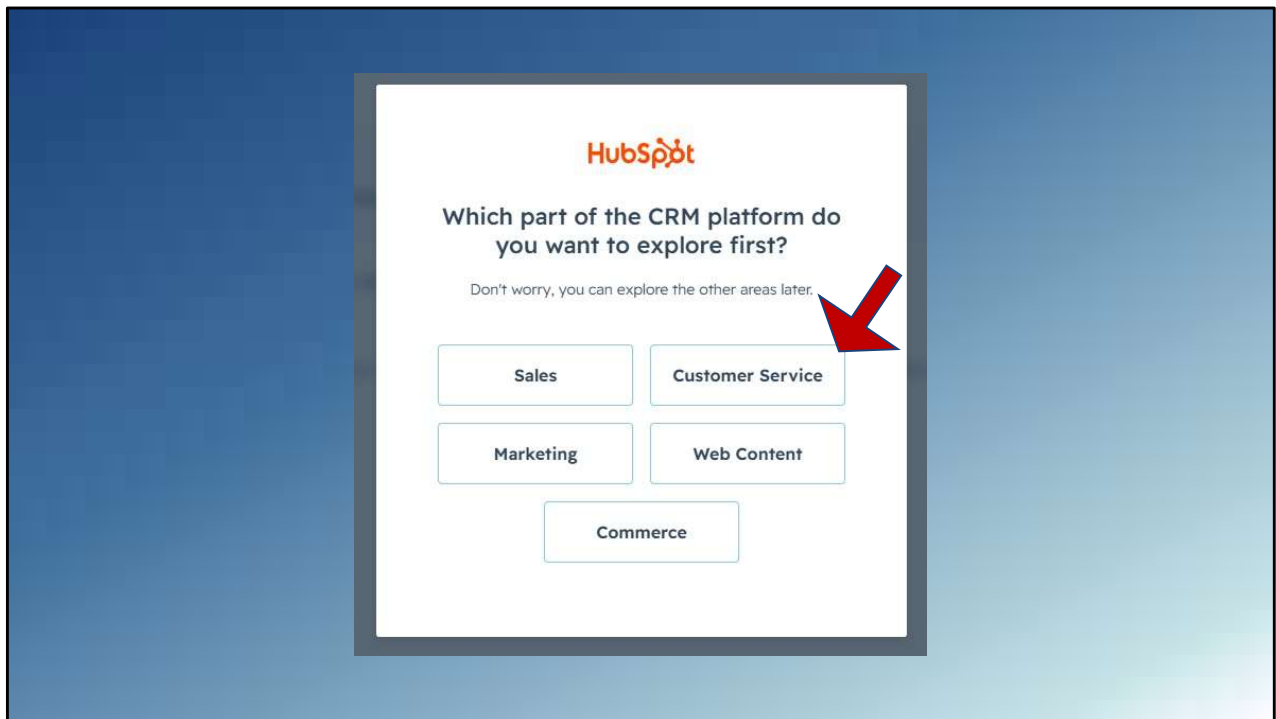
For the ETS program, only two users will be created. One shared login for Phoenix Pro and one shared login for the Simply Health Team. For portal registration, the individual setting up the user account for your team will receive another email from our Housing Support Team that looks like the email above.



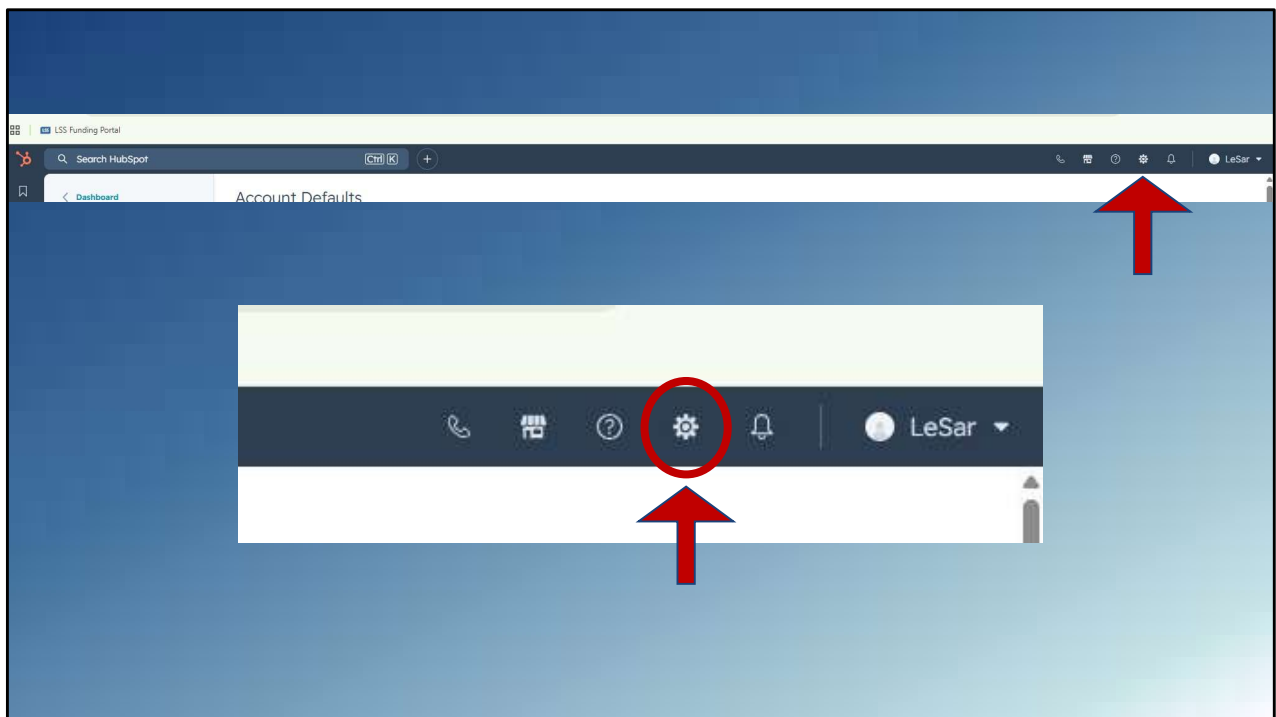
This welcome email will have a button inviting you to join the LeSar team on HubSpot.



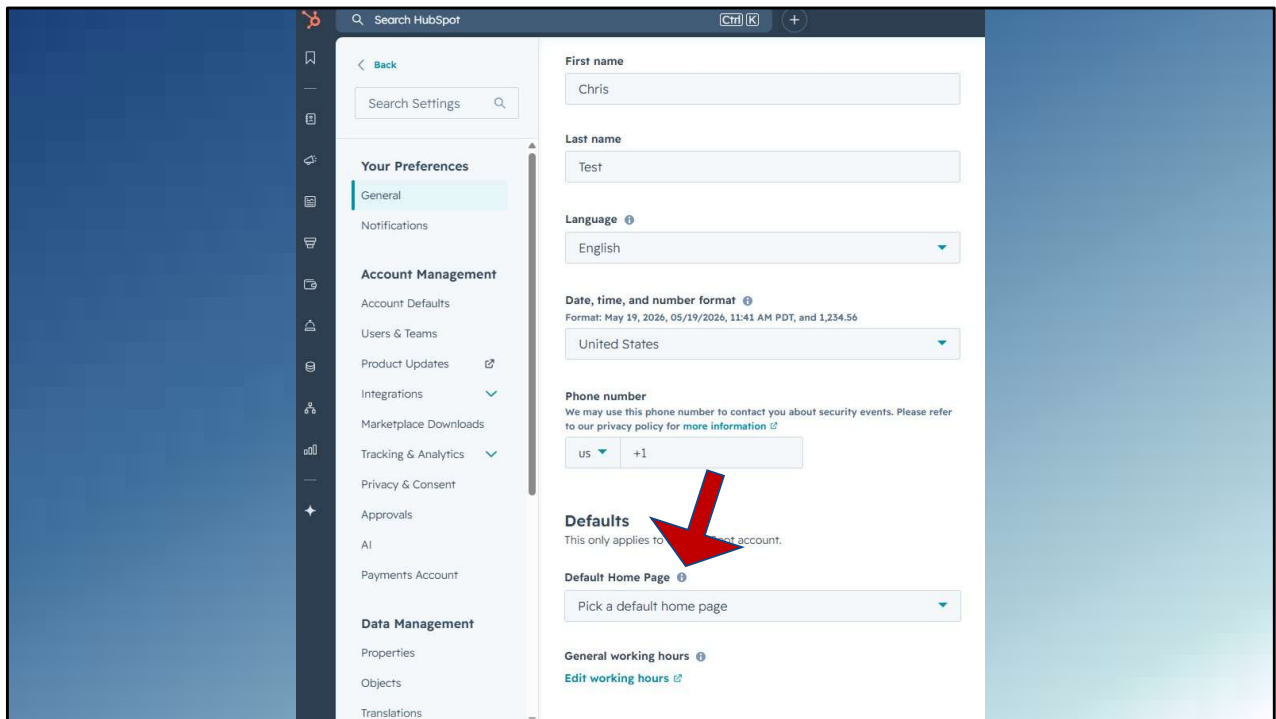
Clicking on the button or the link will open a new tab in your browser. If you are using an email from Google, Microsoft, or Apple, please click the appropriate link to sign in. Otherwise, you can select Continue with email to enter your name and password for logging in.



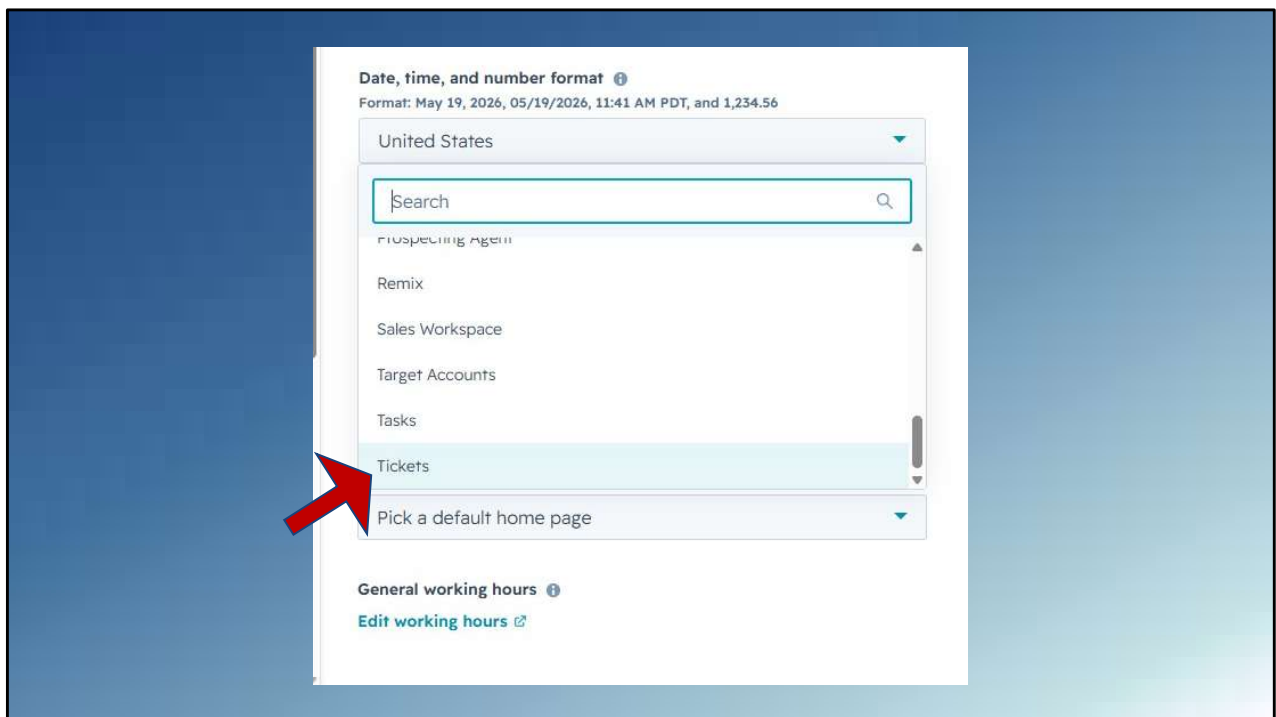
After password creation HubSpot will prompt you to explore an area of the site. For the purposes of this program please select Customer Service.



You are now in HubSpot. The first thing we want to do is set your Homepage to view tickets when you login. Start by clicking on settings in the top right corner, this will be the icon that looks like a gear as shown here.



Clicking on the Settings Icon will take you to the General Preferences section. Scroll down until you see the “Defaults” subsection and click on the dropdown arrow for Default Home Page.



You will then set your Homepage to “Tickets”

Search HubSpot

Tickets - All tickets (1) My open tickets Unassigned tickets

Search

Ticket owner - Create date - Last activity date - Priority - Advanced filters

TICKET NAME	PIPELINE	TICKET STATUS	CREATE DATE	PRIORITY	TICKET OWNER	SOURCE
ETS Test 1	LSS Tickets	Staff Review (LSS Tickets)	May 14, 2026 10:19 AM PDT	--	CT Chris Test (chris.lstest...)	--

Please submit new ticket requests to FlexFund@LeSarDevelopment.com

Email to LeSar cannot include PHI/PII
Body of email should only say "Request to open ETS ticket"

When you login, you will automatically see the available tickets/requests present. Whenever a new referral is ready, LeSar Support Staff will create a new ticket and make it visible to both the Health Plan and the Vendor here. For our team to start a new ticket request, email us directly at flexfund@lesardevelopment.com only stating "request to open ETS ticket". Once a ticket is created by our team you will be able to view it in this screen here.

Tickets

ETS Test 1

Create date: May 14, 2026 10:19 AM PDT
Pipeline: LSS Tickets
Ticket status: Staff Review

Note Email Call Task Meet... More

About this ticket

Ticket Card View:
FL Enhanced Transition Support

Create date
05/14/2026

Ticket ID
45269906522

ETS Communication Info:

Vendor Status of Work
Estimate Assigned
Case Manager (CM)
--
CM Phone
--
Alternate CM
--
Alternate CM Phone
--

Overview

Quick actions

Add note

Recent activities

Search activities Add activities Collapse all

Activity (5/9) All time so far

May 2026

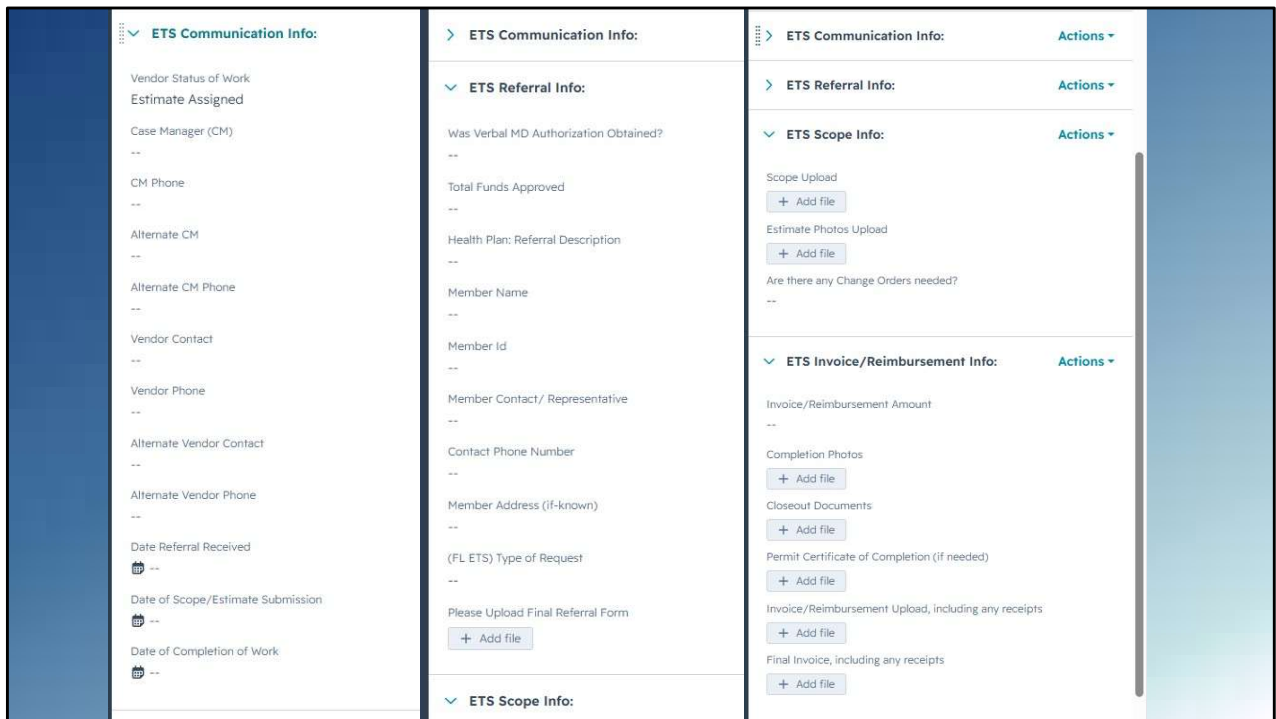
Created May 14, 2026 at 10:19 AM PDT

This ticket was created by Brittany Halfhide

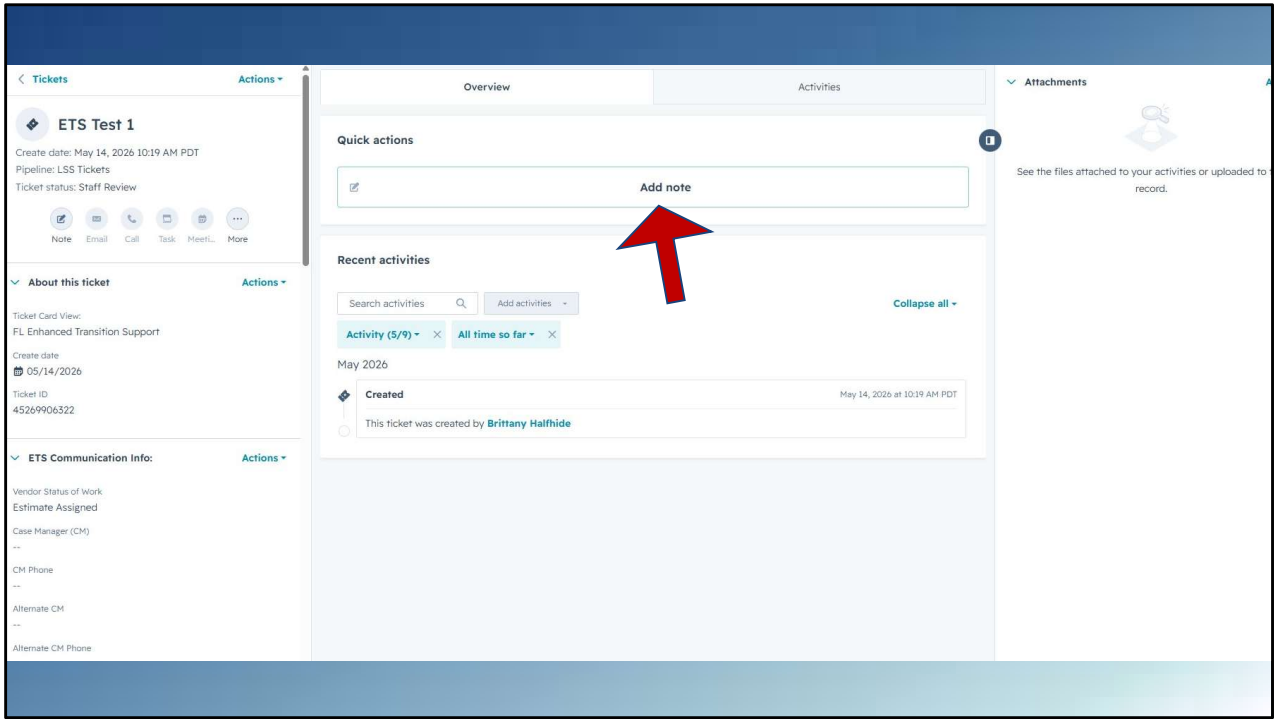
Attachments

See the files attached to your activities or uploaded to this record.

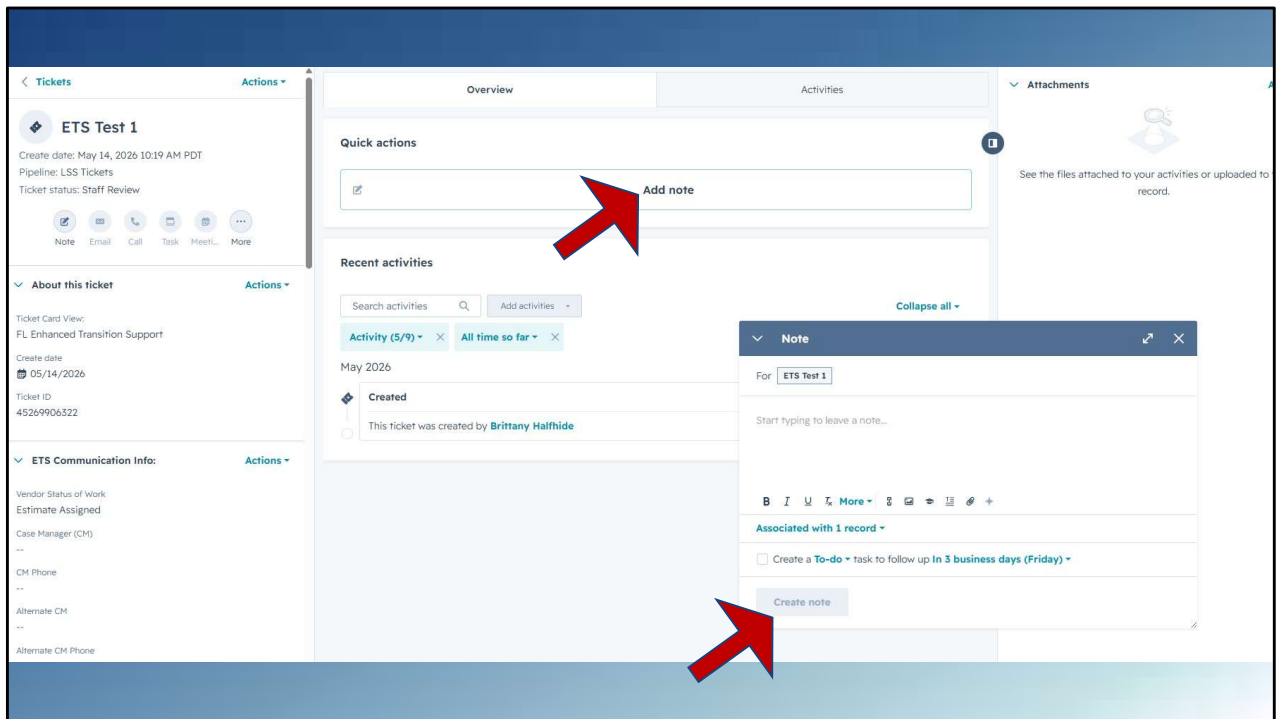
Clicking on any Ticket will open up the Ticket View. On the left-hand side of this view is the information you will input or view for the Contact Information, Status, Referral Information, Etc.



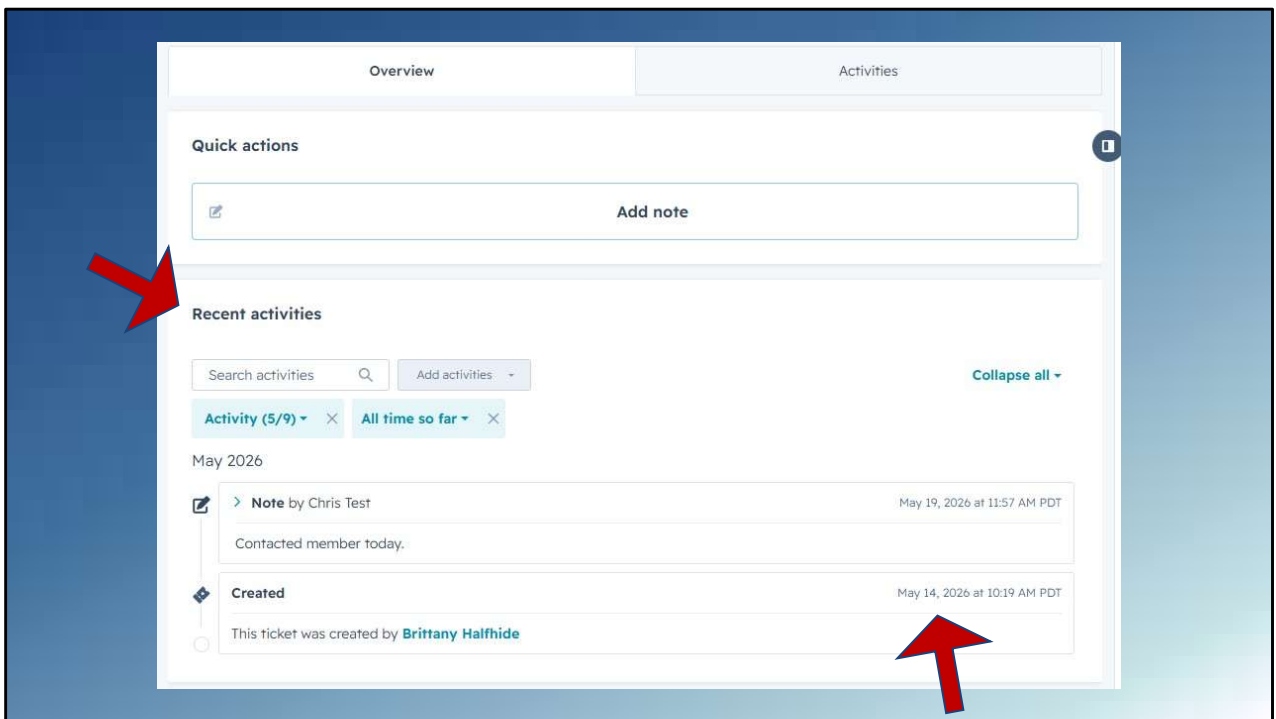
Scrolling the left sidebar will take you to the necessary Info sections for Communication, Referral, Scope, and Invoicing.



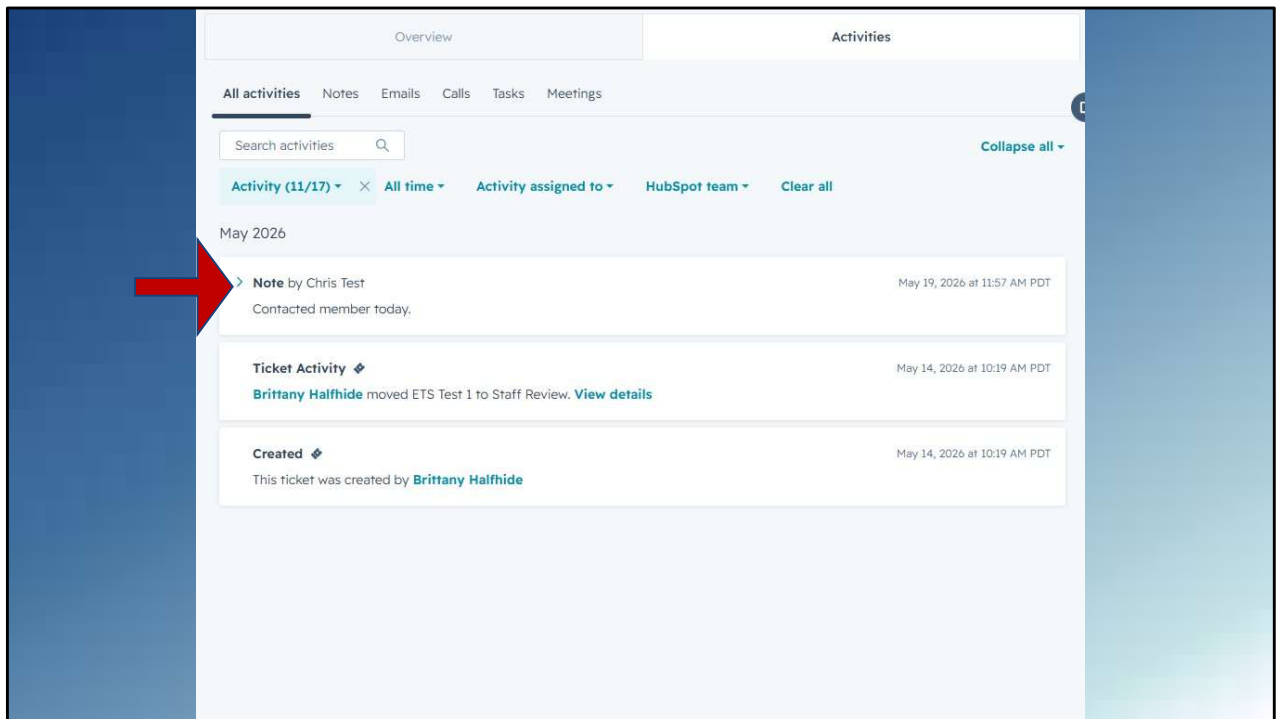
In the center you will see a button for adding notes and Recent Activity related to the Ticket/Referral.



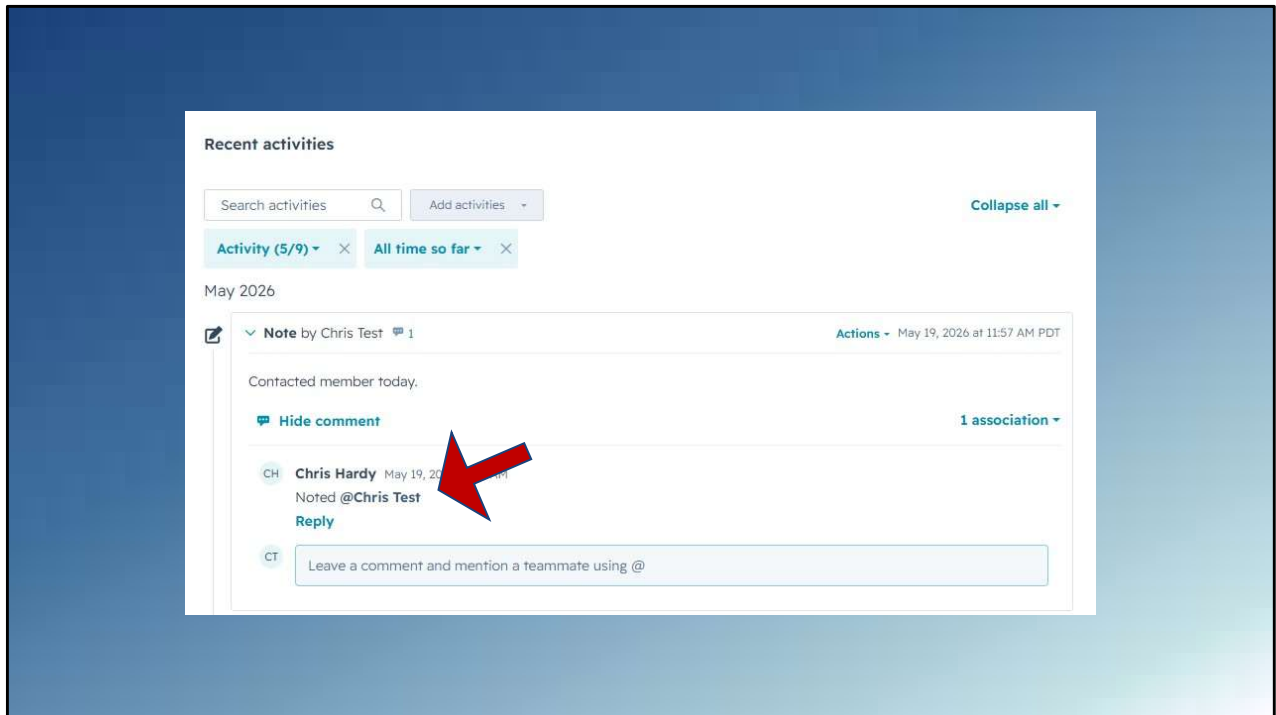
Clicking on Add Note will open up a small window to input any information needed for the referral. Clicking Create Note will save it to the ticket for all to see.



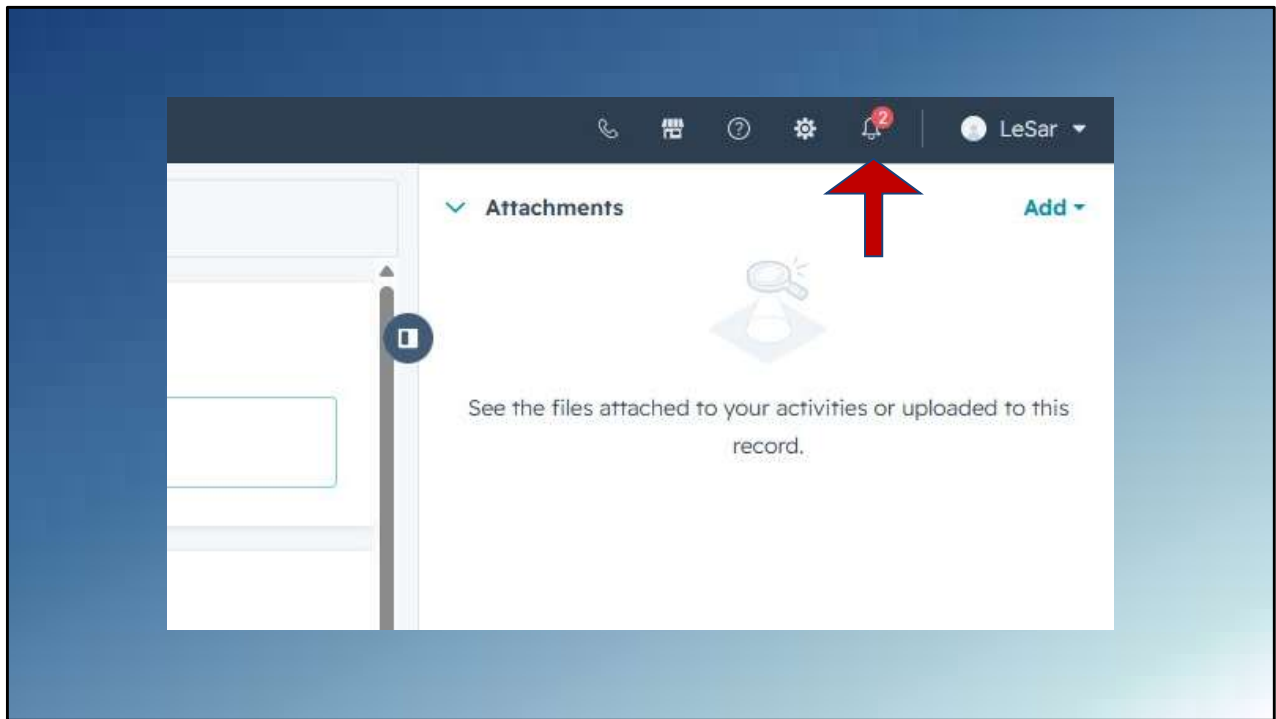
Recent Activities will show notes and status updates in chronological order.



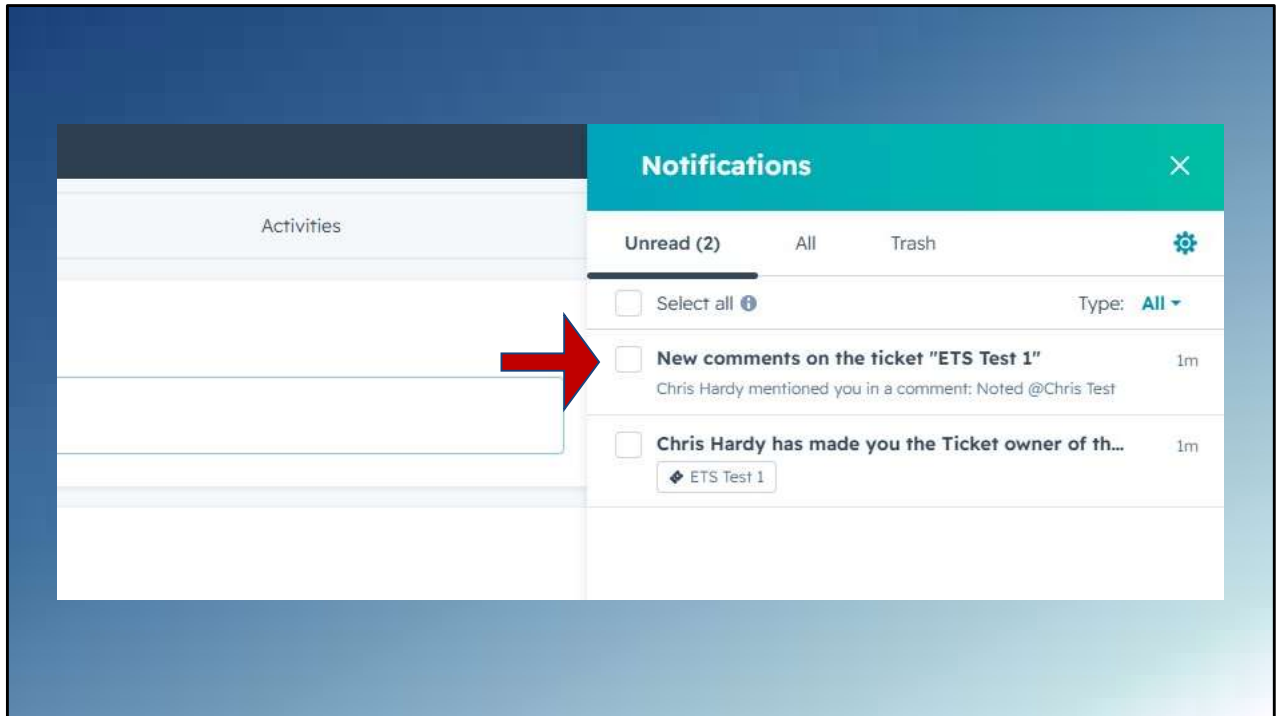
Clicking on a Note or Status will allow you to leave comments pertaining to the note or status.



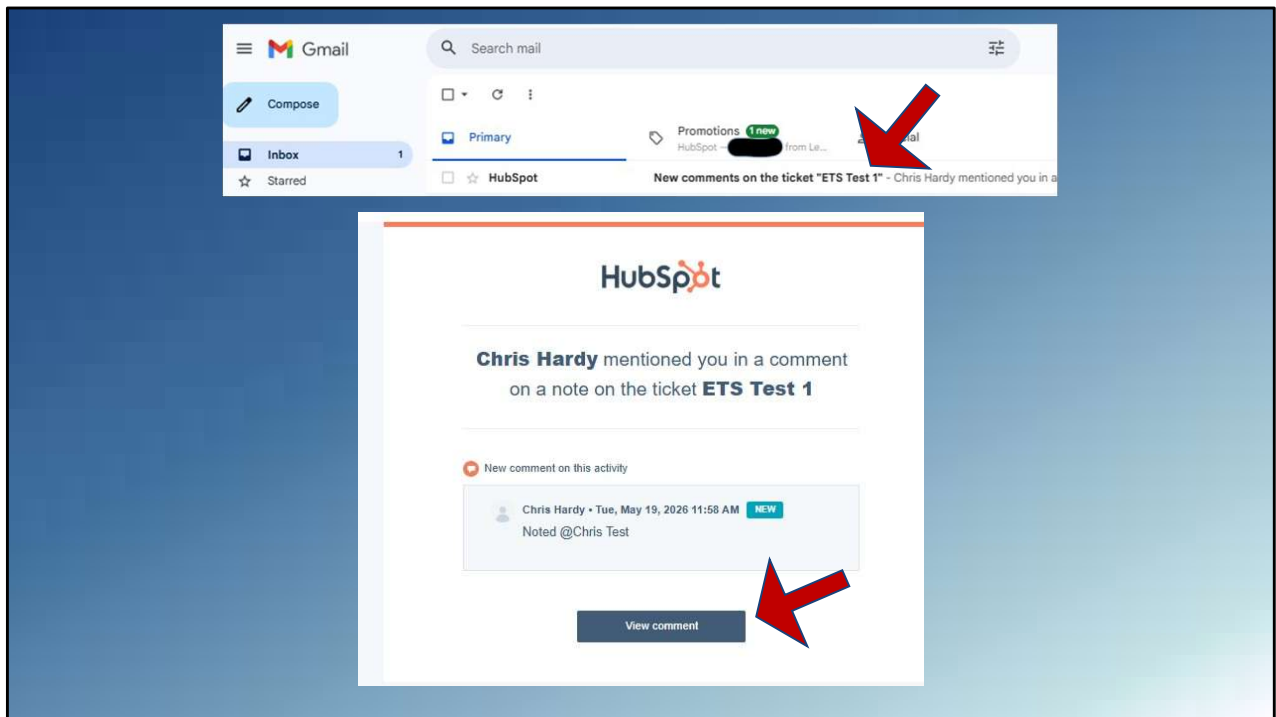
Within the Notes and Comments, you can tag the Health Plan user, the Vendor User, or any of the LeSar Support Staff. DO NOT tag a user if there is PII/PHI in the note/comment you are leaving.



If you are tagged in a comment or note, or if someone leaves a comment on your note, you will get a notification within HubSpot. This notification is represented by a number displayed next to the Bell Icon in the top right by settings.



Clicking on the Bell Icon will show your list of notifications. You can click on any of these to be taken to the related ticket and note/comment.



Tagging another user in a note or comment will also send them an email with a link to the comment. Again, DO NOT tag a user if there is PII/PHI in the note/comment you are leaving.

**Please submit any questions to
FlexFund@LeSarDevelopment.com**

If you have any questions about the information provided here or about the portal and tickets, again please feel free to reach out to us at FlexFund@LeSarDevelopment.com and one of our Housing Support Staff will assist you further.