Cashnet Support Reference Guide

As part of your Cashnet implementation, your institution has access to assistance from Cashnet Support. This guide describes the process for contacting Cashnet Support, the services that Cashnet Support provides, and the Service Level Agreement included in your Cashnet subscription.

Note: Cashnet may occasionally change the details of our service offerings. When this happens, we will update this guide and provide your Cashnet Administrators with an updated copy.

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Cashnet®

Services Provided by Cashnet Support

Cashnet Support can assist you by answering questions and helping solve problems you may encounter while using Cashnet. Common areas where we can assist include:

- Difficulty accessing the service.
- Questions about how to configure or use the service to perform specific tasks.
- Problems when an aspect of the service does not appear to be working properly.
- Resetting forgotten or expired passwords in your Production or Train environments.

Contacting Cashnet Support

There are three ways to contact Cashnet Support:

1. Phone: **(800) 231-9182**
2. Email: CashnetSupport@Blackboard.com
3. Behind the Blackboard self-service portal: https://behind.blackboard.com

Note: If your issue is urgent (for example, a situation that is preventing you from posting transactions), please contact us by phone for the fastest possible response.

When emailing Cashnet Support, your case goes into a queue that is visible to all support staff. If you email an individual Support team member directly, and that person is away, on vacation, or sick, the response could be delayed.

We recommend that you always **Reply All** to emails from Cashnet Support, as this will generally send your reply to both the queue and the individual team member.

System Status Alerts

Cashnet Support uses a mailing list to communicate information about system status and upcoming maintenance to users. We recommend that at least two administrators from each campus join the mailing list.

To join the mailing list, users may send a blank email message to cashnet-alert-subscribe@lists.higherone.com. To leave the mailing list and no longer receive the Alert Mailing List messages, users can send a blank email message to cashnet-alert-unsubscribe@lists.higherone.com.

Authorized Support Contacts

Each Cashnet client designates two staff members to serve as Authorized Support Contacts when Cashnet is implemented. Additional Authorized Support Contacts can be granted if a request is sent by email to CashnetSupport@Blackboard.com from a staff member that is currently serving as an Authorized Support Contact.

Authorized Support Contacts have the ability to designate who may contact and open cases with Cashnet Support, request configuration changes to Cashnet, and request (or perform) password resets.

Authorized Support Contacts are responsible for maintaining the institution's contact list. Any updates to the contact list should be communicated to Cashnet Support by phone or email.

For security reasons, changes to the Authorized Support Contact list must be made by an existing Authorized Support Contact.

Who May Contact Cashnet Support

Any member of a client's staff may contact Cashnet Support, provided the person meets the following two criteria:

1. The person must have been previously authorized to contact Support by an Authorized Support Contact. To authorize someone to contact Support, an Authorized Support Contact must provide Support with the name, phone number, and email address of the person by phone or email.
2. The person must have attended Cashnet training for the module of the system that pertains to the request for assistance. This training can be performed in a variety of ways, including classes held at your institution, classes offered at a Cashnet User Group Conference, and web-based training.

Cashnet Support will provide operational assistance to users who meet these criteria. For urgent issues that require immediate attention, any representative of the school or institution should call (800) 231-9182. However, for security reasons, Cashnet will not provide confidential information from the system to anyone other than the designated Authorized Support Contacts. Similarly, Cashnet will not accept requests to perform password resets, configuration changes, or other modifications to the system unless the requests come from Authorized Support Contacts.

Hours of Operation

Cashnet Support is open from **5:00 AM to 6:00 PM Pacific Time, Monday through Friday**. You may open a case by email or through the Behind the Blackboard self-service portal 24 hours a day, 7 days a week. If you open a case by email or through the portal outside of the regular hours of operation, we will respond on the next business day.

Cashnet Support is closed on the following holidays: New Year's Day, Martin Luther King, Jr. Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Thanksgiving Day, the Friday after Thanksgiving Day, and Christmas Day. In addition, we may have reduced hours on Federal Reserve holidays, when many client institutions are also closed.

Clients who anticipate a need for support outside our regular hours of operation may make arrangements 7 days in advance for a representative to be on call. There may be an additional charge for this service.

Information to Have Available When Contacting Support

When reporting a problem to Cashnet Support, please try to have as much of the following information as possible:

1. The Cashnet environment you were using when the problem occurred (i.e., Production or Train).
2. The screen, program, or menu item you were attempting to access.
3. The student or Cashnet operator ID encountered the problem.
4. The date and time the problem occurred.
5. Any significant identifiers, such as student IDs or transaction numbers, that can help us locate and diagnose the problem.

If you don't have all of this information available, you should still feel free to contact Cashnet Support, but in some cases our ability to assist you may be limited without this data.

What to Expect When You Contact Support

When you contact Cashnet Support, you will usually be able to speak with a team member immediately. If all Support team members are assisting other customers, you will be asked to leave a message, and a team member will call you back as quickly as possible.

Depending on the nature of your issue, you may be asked to perform various steps to resolve the issue or assist with troubleshooting. You may be asked to provide screenshots of error messages that you encountered. In some cases the Support team member may email you a procedure to be performed.

Support uses certain tools to assist in troubleshooting problems. Under certain circumstances, Support team members may request an online meeting so that they can see your Cashnet screen and observe the problem first-hand. When you report a connectivity problem, we may ask you to install and run a piece of software that attempts to connect to our site repeatedly over a period of time, and ask that you send us the log file with the result.

In many cases, the Support team member will be able to resolve your issue during the initial call. If the issue requires further research, it will be escalated to Senior Level Support.

Case Tracking

Calls and emails to Cashnet Support are added to our tracking system once we've determined that a case needs to be opened. The case is used to track all activity on an issue, from the time you report it until it's resolved. When your issue is added, you are given a unique Case Number that identifies your issue in the tracking system.

Please make note of the Case Number and use it when communicating with us about the problem. By including the Case Number on subsequent calls or emails regarding the same issue, we'll be able to locate case notes and history, provide you with the current status, and bring the case to a resolution more quickly. If you fail to include the case number in emails, it will slow our response time.

Issues reported through the self-service portal become cases automatically, and the case number will be assigned and displayed to you when your issue is saved. You can return to the self-service portal to view updates and the status of the case at any time.

Service Performance: Case Priority Levels

Each case is assigned a priority based on the impact the issue has on operations. These priorities are used to determine which issues receive attention first and how quickly various departments at Cashnet respond to the issue, so it's important that case priority be assessed accurately. The following table lists our case priority levels.

Note: When reporting an urgent problem, please call **(800) 231-9182** for immediate assistance.

Table 1: Case priority levels.

PRIORITY	TITLE	DESCRIPTION	EXAMPLE	RESPONSE TIME
P0	Critical – Multiple Clients Impacted	Any issue which meets the definition of P1 or P2 and impacts multiple Clients.	Multiple clients get timeout errors logging in.	Immediate (15 minutes).
P1	Critical – Single Client Down	A major component such as Cashiering, EBPP, or ePayment is not usable.	Crashes when trying to start Cashiering. One client cannot receipt transactions.	Immediate (15 minutes).
P2	High – Prevents Completion of Daily Work	Transactions can be received but cannot be properly posted, balanced, or settled, or there is some other issue that seriously interferes with the business office's operations.	Credit cards will not settle.	90 minutes (during support hours).
P3	Normal (default for new cases)	Most issues not categorized above, including questions or problems that do not severely impact the ability to receipt, post, balance, or settle payments.	Unable to change a receipt trailer.	2 business days.
P4	Low	Issues which the customer agrees do not require prompt attention.	A field heading is misspelled on a screen.	1 week (may not be resolved, but we will send a response).

Enhancement Requests

Cashnet welcomes and encourages ideas from our clients on how to improve our products. Many of the best enhancements that we have made to Cashnet over the years came as a result of client suggestions. If there is something you would like Cashnet to be able to do for you, please inform Cashnet Support through phone, email, or the Self-Service Portal. Your enhancement request will be logged in our case tracking system and you will be given a Case Number to track the request.

Cashnet personnel meet periodically to prioritize enhancement requests that have been received and determine which ones will be incorporated into upcoming releases. When prioritizing potential enhancements, the following factors are considered:

- How many clients are likely to benefit from the enhancement?
- How much will the enhancement benefit those clients who use it?
- How long will it take to implement the enhancement?
- Will the enhancement have any negative impacts, such as making the system run more slowly or making it more complex to use?

When contacting Cashnet Support to request an enhancement, please explain the reason for the enhancement (i.e., what business problem you are trying to solve). In many cases Cashnet Support is able to show clients other options that already exist to accomplish the same objective. Also, if you are requesting multiple enhancements, please indicate the relative priority of each one. This helps us assess the importance of each enhancement for your needs.

Upgrade Requests

Cashnet Support may require significant lead-time to schedule upgrade requests. These requests consist of two main categories: (1) Cashnet-ERP interface upgrades after you upgrade your ERP, and (2) changes to your networking configurations, including your VPN or firewall rules, protocols and ciphers (e.g., SSL to TLS or RC4 removal), and Shibboleth single sign-on.

Although upgrade requests can vary significantly, in most cases Cashnet Support will need to gather information about your configuration and have your Cashnet-trained technical resources perform tasks in your environment. After we discuss the requirements to complete your upgrade request, we will determine a timeline for completion.

The table below provides an overview of the initial steps required for each upgrade type as well as the approximate timeline for completion. If you have any questions, please contact Cashnet Support.

Table 2: Upgrade steps and approximate timeline.

UPGRADE TYPE	INTIAL UPGRADE STEPS	APPROXIMATE TIMELINE
Cashnet-ERP Interface	Please fill out the ERP Upgrade Form associated with your ERP, located in the Cashnet **Support Library > Forms > ERP Upgrades** folder and send it to Cashnet Support. If a form is not available for your ERP, contact Cashnet Support for instructions.	45 days
Networking Configurations/Other	Please Cashnet Support as soon as possible for instructions prior to performing your upgrade and for determining a timeline for completion.	Can vary significantly depending on the request.

Password Resets

There are four kinds of password reset requests that Cashnet clients and Support handle:

1. Cashnet operator passwords, used to log in to the Cashnet Administration site.
2. Student passwords, used to log in to the ePayment site.
3. Parent PIN passwords, used to log into a student's ePayment site.
4. EFT server passwords, used to securely transfer files to and from Cashnet.

Reset requirements and procedures for each of these are slightly different and are explained below in greater detail.

Note: For security reasons, a limited number of Cashnet personnel are able to perform password resets. Therefore, it may take up to 24 hours to reset a password via Cashnet Support.

Operator Password Resets

If a client staff member needs his Cashnet operator password reset, either because he has forgotten it or because it has expired, he should first contact the institution's Cashnet Administrator, Authorized Support Contact, or other individuals at the school who have been granted permission to reset operator passwords. This security measure is required because Cashnet Support cannot identify all of a client's staff members and cannot know if the staff member was recently transferred, suspended, or terminated.

If a Cashnet Administrator or Authorized Support Contact needs his own password reset and nobody else is available with the necessary permissions to do so, he may contact Cashnet Support for assistance. After following our established security procedures, Cashnet Support will reset the operator password for the Cashnet Administrator or Authorized Support Contact.

Student Password Resets

Cashnet Support cannot reset student passwords, which are often maintained outside of Cashnet in the institution's ERP self-service portal. If Cashnet Administrators or Authorized Support Contacts want to set a student's Cashnet password to a known value and have the necessary permissions to do so, they may do so through the Customers page in Cashnet System Setup.

Parent PIN Password Resets

For privacy and compliance with the Federal Education Records Privacy Act of 1974 (FERPA), neither Cashnet Support nor school staff may view or reset a Parent PIN password. Students themselves must log into the ePayment site to reset Parent PIN passwords themselves.

EFT Password Resets

When Cashnet is first deployed, Cashnet Administrators are provided with two sets of login credentials for the Cashnet EFT server, corresponding to the school's Production and Training environments. Cashnet Support does not store and cannot retrieve these credentials.

A Cashnet Administrator or an Authorized Support Contact may contact Cashnet to request a reset of a school's secure file transfer password if necessary. This reset will break any existing automated transfer processes, shell scripts, etc., that rely on the original credentials.

Production and Train environment EFT credentials may be reset independently of each other.

Client Responsibilities

To provide effective support, Cashnet Support needs our clients' cooperation and assistance in the following areas:

- Clients should instruct only their Authorized Support Contacts to call or email Cashnet Support. Only Authorized Support Contacts may use the Support Self-Service Portal. To enable access to the portal for a specified user, the Authorized Support contact may contact Cashnet Support.
- Clients should make sure that all personnel contacting Cashnet Support have been properly trained to use Cashnet. If needed, Cashnet training in a variety of forms is available for an additional fee.
- When using modules or interfaces that require technical expertise, clients may need to involve resources from within their organization with the appropriate skill levels. Examples of these include single sign-on integration or eMarket checkout implementation.
- Clients should not instruct their customers (e.g., students, parents, or authorized payers) to contact Cashnet Support for assistance. Students, parents, and authorized payers should call the SmartPay Support Line at **(800) 339-8131**.

- When reporting a problem, clients are responsible for assisting Cashnet Support in reproducing the problem.
- When reporting an urgent problem, please call **(800) 231-9182** for immediate assistance.

Reference Manuals & Other Documentation

Reference manuals for Cashnet modules are available in the Support Library within the Cashnet through the **Training & Support** link in the left sidebar. Reference manuals are for the exclusive use of authorized Cashnet operators at your institution; you are responsible for not sharing this information with anyone except other Cashnet operators at your school.

You are welcome to access these reference guides and manuals on our website at any time, but **you may not post them on your own website or otherwise electronically store or reproduce them**.

PCI Compliance

Blackboard operates in compliance with the Payment Card Industry Data Security Standard (PCI-DSS). Blackboard is certified as a Level 1 Service Provider under both VISA Cardholder Information Security Program (CISP) and MasterCard Site Data Protection (SDP). Evidence of this compliance may be verified by visiting the Visa or MasterCard website or by contacting your Relationship Manager.

System Availability

Blackboard will use its best efforts to ensure 99.9% Availability of the Service. **"99.9% Availability"** means that the Service will be unavailable no more than 43 minutes (> .10%) in any calendar month, as determined by Blackboard (excluding any period of unavailability described in Exception section below). The Service shall be deemed to be unavailable when Blackboard's automated monitoring system is unable to access the web or database servers of the Service (**"Unavailability"**).

Exceptions: Blackboard's service level commitment does not cover any unavailability attributable to: (1) Customer's use of the Service otherwise than in accordance with the Documentation or with user manuals from time to time made available to Customer; (2) any data entered into the Service by Customer; (3) any event beyond the reasonable control of Blackboard, including the malfunction or unavailability of any public Internet backbone or network or of any server or other equipment outside of Blackboard's facility, or any failure of Customer's equipment or local access service, or (4) Scheduled Maintenance pursuant to Scheduled Maintenance Windows section below.

Scheduled Maintenance Windows

Periodically it is necessary for Cashnet to perform maintenance activities on the environment. Maintenance windows occur every Sunday between 1:00 AM and 6:00 AM Eastern Time. Because the Cashnet environment is fully redundant, most activities can be performed on one server at a time and do not result in any disruption to users. During this time, capacity and redundancy may be reduced, but the site continues to operate normally from the perspective of end users. Batch jobs are never scheduled during the maintenance window, and clients are advised not to schedule batch file transfers during this period.

If we anticipate maintenance will have an impact on end users, we will inform Cashnet Administrators by email. Except in the case of an emergency, notification takes place at least 24 hours in advance. Whenever possible, such maintenance is planned for Sunday mornings, which are normally the lightest usage period for the environment.

In extremely rare cases, maintenance activities may extend beyond the normal window. This happens when necessary activities will take longer than three hours and cannot reasonably be broken into smaller steps. Should this be necessary, the maintenance will be scheduled for weekends or holidays and Cashnet Administrators will be notified at least 72 hours in advance.

Releases and Refreshes

New versions of Cashnet are released approximately four times per year. Releases typically contain a combination of new features, enhancements to existing modules, and bug fixes.

Cashnet Support coordinates with clients to upgrade Train environments and distribute release notes. Once Train environments have been upgraded and clients have had reasonable time to test, Production environments are upgraded. To minimize disruptions, all upgrades are scheduled in advance and take place outside regular business hours.

Because Cashnet is a hosted solution, we are not able to leave older versions of the software in place for extended periods of time. Clients who desire to test new releases should be sure to do so promptly when the new release becomes available. If you foresee a conflict with a scheduled upgrade date, please contact Cashnet Support promptly so that accommodations can be made.

When minor bugs are discovered in a release, Cashnet will create a refresh to address the problem. Refreshes are minor updates to the code which can be applied without any downtime or changes to client configurations. These are done on an as-needed basis and do not require advance planning by clients.

Train Environments

In addition to a Production environment, each Cashnet client receives access to a Train environment that can be used for training new staff, testing new procedures and interfaces, and other purposes. When a new release of Cashnet becomes available, the client's Train environment will be upgraded prior to the Production environment.

The Train environment is created by making a full copy (sometimes called a "clone") of the Production environment. This is done approximately one week after the client goes live. The Train environment is accessed using a separate URL.

At the client's request, the data in the Train environment will be refreshed by making another full copy of the production environment once every 12 months. More frequent refreshes are available for an additional charge, as are additional Train environments.

Networking Information

For networking information, such as email IP addresses you must white-list, refer to the *Cashnet Technical Reference Guide*, available in the Cashnet Support Library through the **Training & Support** link.