RivCoONE Connect – Troubleshooting Tips

Use this guide to solve the most common RivCoONE Connect issues on your own. Find your issue below and follow the steps. If the steps don't fix it, or a tip tells you to, submit a ServiceNow ticket using the steps in **Submitting a ServiceNow Ticket** at the end of this guide.

Each tip is labeled by type:

- **[Data Issue]** – a problem with a resident or referral record
- **[Functionality]** – how a feature works or where to find it
- **[Access & Permissions]** – your account's role or permissions
- **[Workflow Change]** – something that moved or now works differently

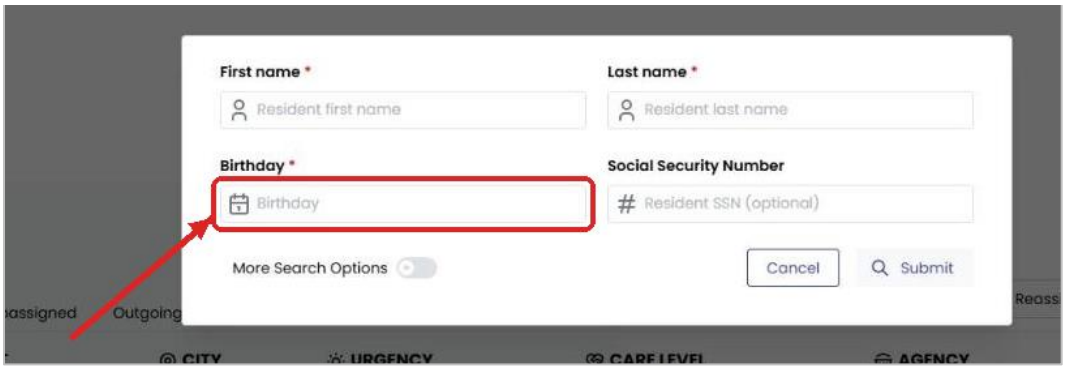
Before You Start: Quick Checks

- **Search before you create.** Always search for a resident by first name, last name, and date of birth (DOB) before starting a new registration. This prevents duplicate profiles.
- **[Very Common Issue] Double-check the DOB.** A wrong date of birth is the most common reason a resident doesn't show up in search.
- **[Very Common Issue] Check the Disclosure Authorization.** If you can't see a profile or referral, the resident's consent settings are the most likely cause (see tip 7).
- **Refresh or sign back in.** Refresh the page, or sign out and back in, before reporting an issue.

Common Issues and How to Fix Them

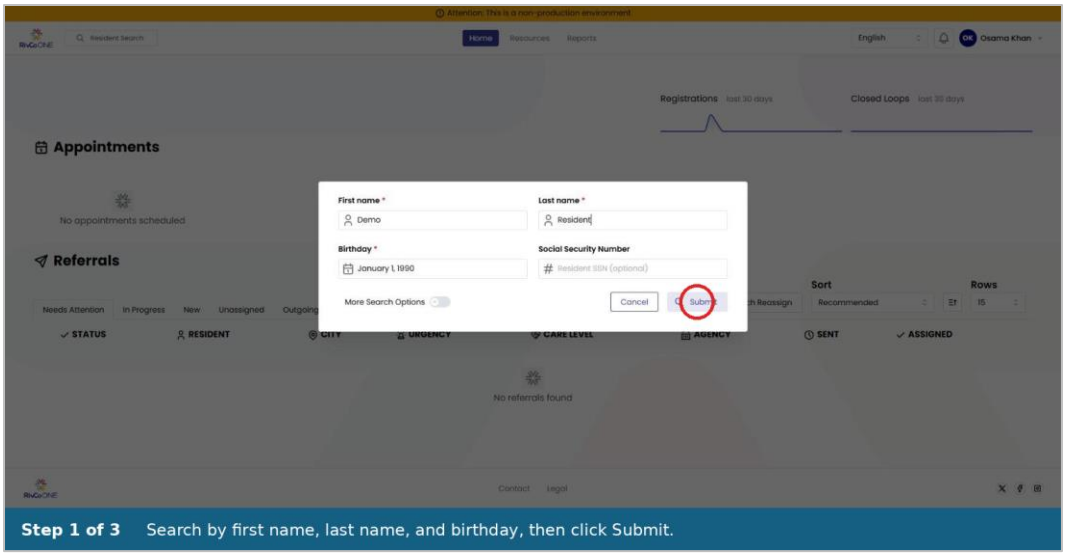
Search, Registration and Duplicates

1. **[Data Issue] I cannot find a resident after creating their profile**
    a. Double-check the date of birth (DOB) you entered in search. If it doesn't exactly match the DOB on the profile, the resident won't appear in the results.
    b. Search again using the resident's first name, last name, and birthday. The Social Security Number field is optional.



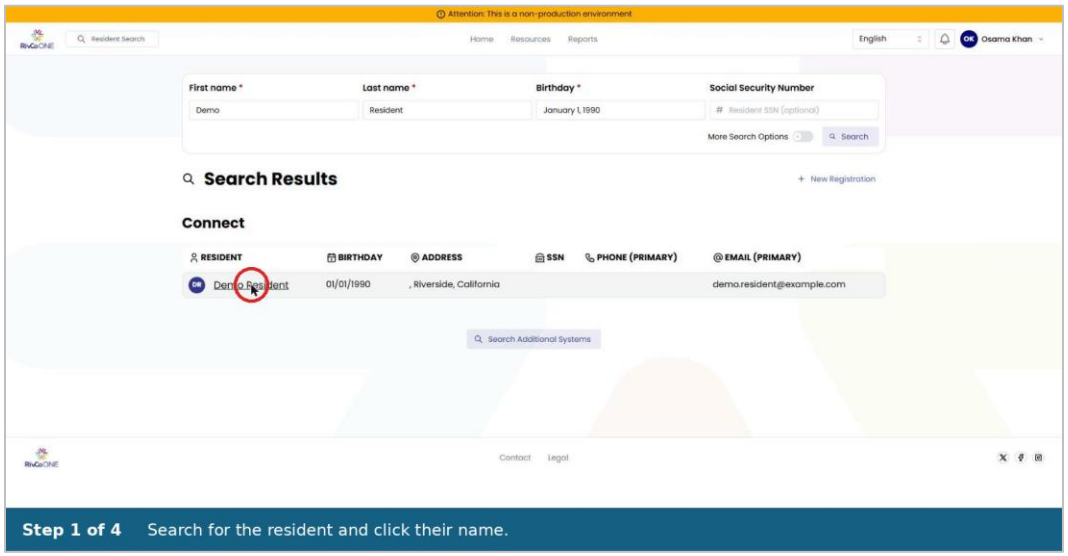
Resident Search: First name, Last name, and Birthday are required. SSN is optional.

2. **[Workflow Change] I can't find the New Registration button**
    a. The **New Registration** button now appears after you search for a resident. This change makes sure you check for an existing profile first, so duplicates aren't created.
    b. To register a new resident:
        i. Search for the resident by first name, last name, and DOB.
        ii. Review the results to make sure the resident doesn't already have a profile.
        iii. If they aren't in the results, click **+ New Registration** at the top right of the Search Results.



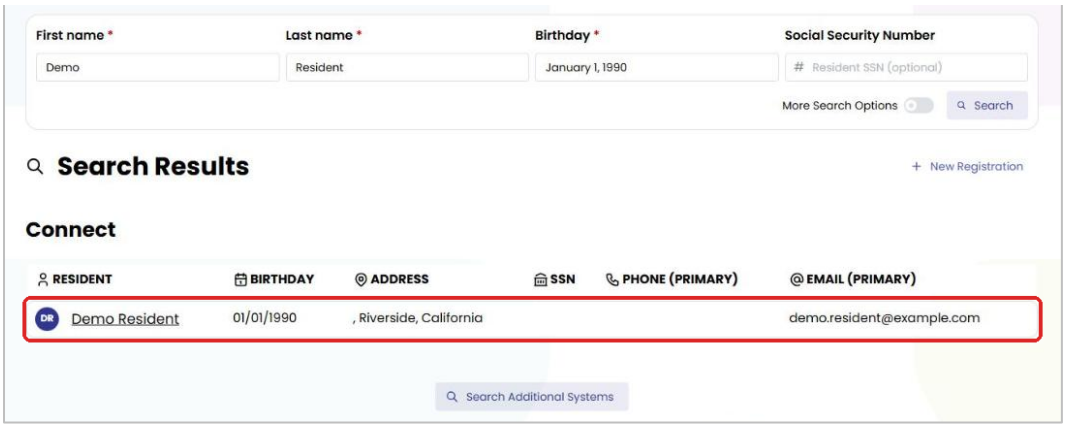
VIDEO V1: *Searching first, then starting a New Registration (10 sec).*

3. **[Functionality] I used Save & Exit during a registration, the resident's code expired, and now I can't resume it**
    a. This is working as intended. When you click **Save & Exit** during registration, a One-Time Access Code and QR code appear so the resident can finish the remaining steps on their own. **The code expires after five minutes.**
    b. If the code has expired, or you want to finish the registration yourself:
        i. Log in as an employee and search for the resident by first name, last name, and birthday.
        ii. Click the resident's name. The registration opens where it left off.
        iii. To finish it yourself, click the **Start** button for the next form. To give the resident a new code, click **Save & Exit** again.



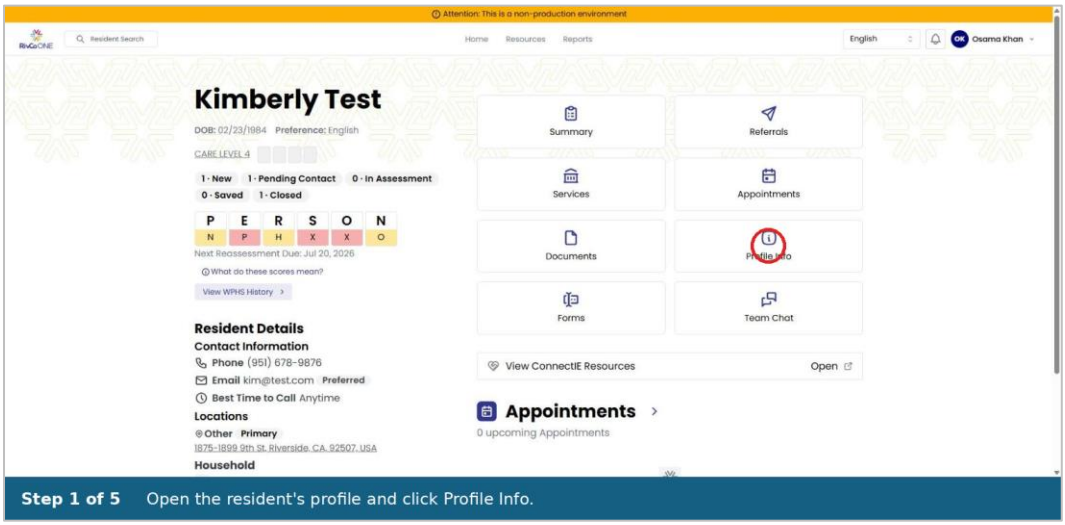
VIDEO V2: *Resuming an incomplete registration or creating a new code (13 sec).*

4. **[Data Issue] I imported a resident, had an issue during registration, imported them again, and now there are duplicates**
    a. If something goes wrong partway through registration after a profile is imported, **don't import the resident again**. Search for the incomplete profile you started and finish the registration from there. This prevents duplicates.
    b. Incomplete profiles look the same as complete ones in the search results. Click the resident's name, and if the registration isn't finished it opens where it left off.
    c. If a duplicate was already created, follow tip 5.



An incomplete registration still appears in search. Click the name to pick up where it left off.

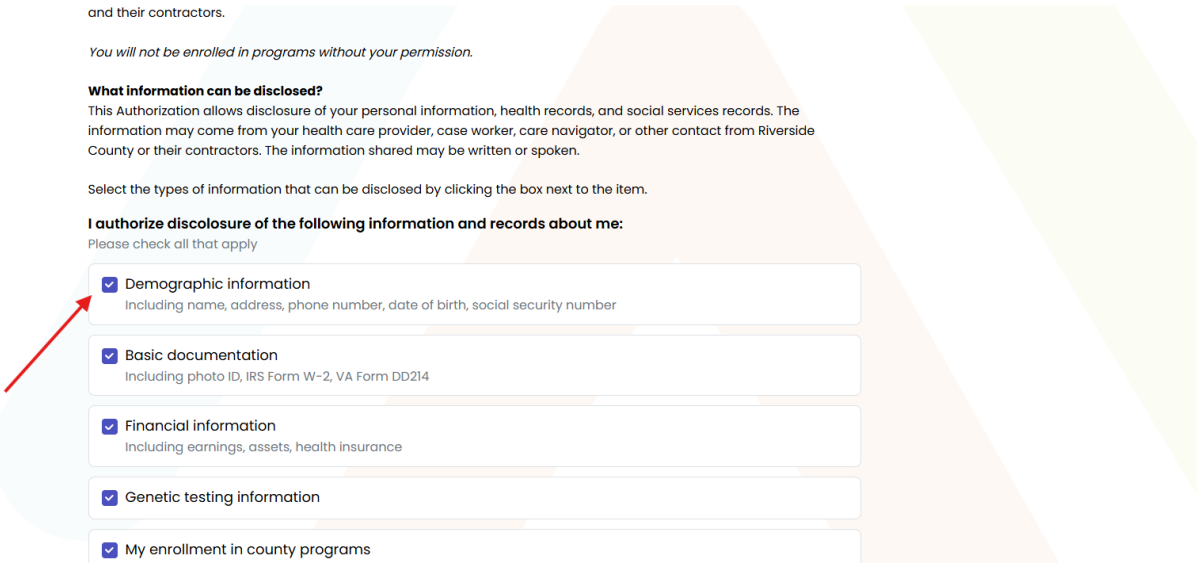
5. **[Data Issue] I see duplicate profiles for the same resident**
    a. **Submit a ServiceNow ticket** that includes:
        i. The resident's first name, last name, and date of birth (DOB).
        ii. A link to the most complete profile, which is the one you want to keep.
6. **[Data Issue] I completed a registration and realized incorrect personal information was entered**
    a. To correct it:
        i. Go to the resident's profile.
        ii. Click **Profile Info**.
        iii. Click **Account Information**.
        iv. Click **Edit Information**.
        v. Make your changes, then click **Submit** to save.



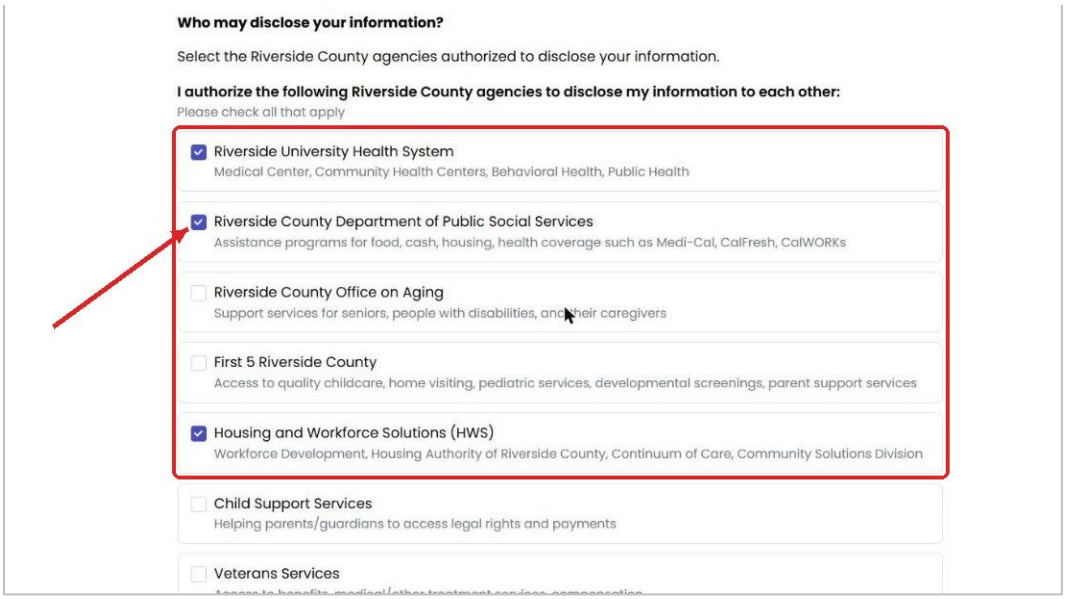
VIDEO V3: *Editing a resident's account information (15 sec).*

Disclosure Authorization and Record Access

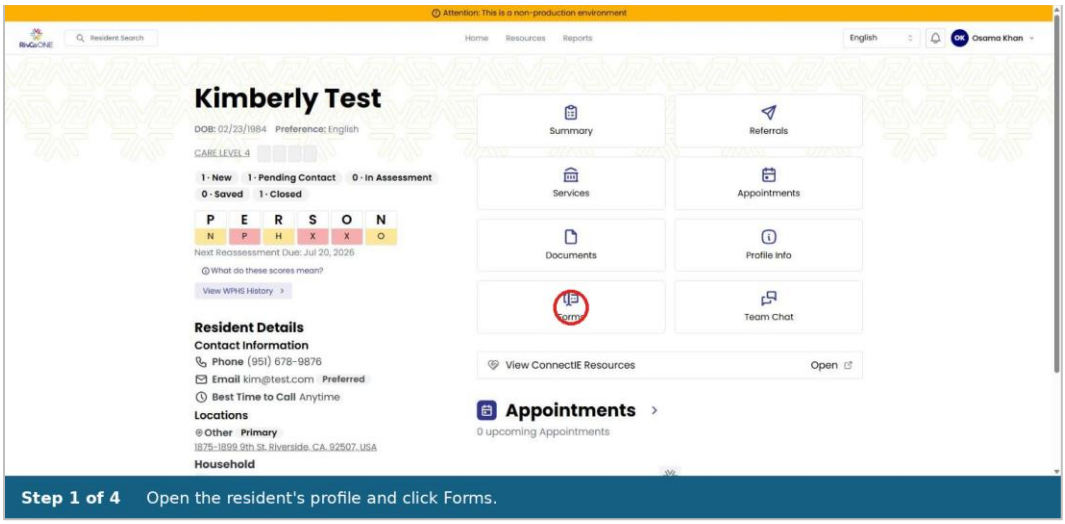
7. **[Data Issue] I can't see a resident's profile after registration, or I can't open a referral I created or received from another agency**
    a. Check the resident's Disclosure Authorization. Usually the **Demographic Information** checkbox and/or your agency's checkbox is not checked.
    b. To fix it, the Disclosure Authorization needs to be updated:
        i. If you work with the resident directly, contact them, then go to the resident's profile > **Forms** > **Disclosure Authorizations** > **Update Authorizations** and update it with them.
        ii. If the referral came from another agency, contact that agency (the lead agency), explain the issue, and ask them to update it.
    c. If you still can't see the profile or referral after the Disclosure Authorization is updated, **submit a ServiceNow ticket** with the resident's first name, last name, DOB, and the profile or referral link.



The Demographic Information checkbox on the Disclosure Authorization.



The agency checkboxes: the resident's information is shared only with the agencies that are checked.



VIDEO V4: *Finding and checking a resident's Disclosure Authorization (12 sec)*

8. **[Data Issue] Old referrals marked "No Access" are stuck on my dashboard, and I can't open, update, or close them**
    a. These are older referrals where the resident did not grant consent. They were created before the current consent process, which now works correctly. You can't take action on them, and you don't need to.
    b. RCIT is aware of these referrals. If one is getting in the way of your work, **submit a ServiceNow ticket** with the referral link(s) and ask for it to be closed.

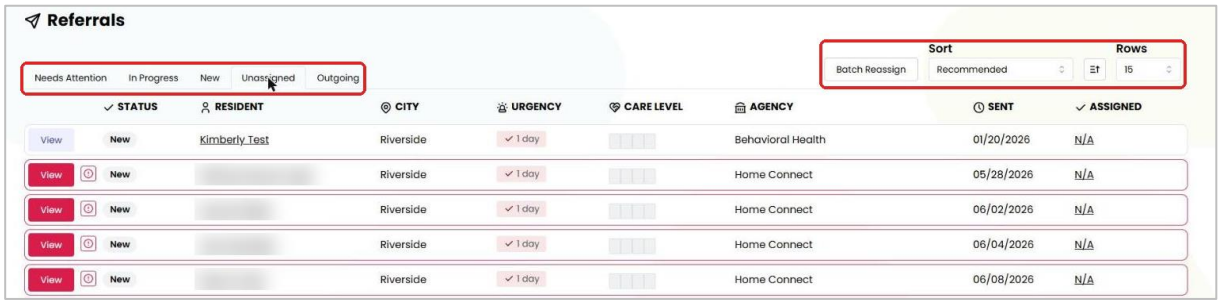
Referrals

9. [Functionality] **I want to close a referral I'm no longer pursuing or can't complete, and I can't close it myself**
    a. Contact the lead agency and ask them to close the referral. If you can't close it because you don't have access, ask them to update the Disclosure Authorization.
    b. If that doesn't solve it, **submit a ServiceNow ticket** with the resident's first name, last name, and DOB (or the profile link) and the referral you want closed. RCIT will close it for you.
10. [Functionality] **I can't close a referral because the outcome I need is missing or incorrect**
    a. Make sure an outcome is selected before closing the referral.
    b. If none of the available outcomes fits your department's work, **submit a ServiceNow ticket** with your department name, the referral link, and the outcome you need.
11. [Functionality] **A referral is behaving unexpectedly: it asks me to assign a referral that's already mine, or it closed on its own**
    a. These may be system issues rather than something you did. **Submit a ServiceNow ticket** with the referral link, what happened, the approximate date and time, and a screenshot if you have one.
12. [Data Issue] **A referral was sent to a department or staff member who can't act on it**
    a. Contact the lead agency that sent the referral and ask them to route it to the right department.
    b. If it still can't be routed correctly, **submit a ServiceNow ticket** with the referral link and the department it should go to.

Dashboard

13. [Functionality] **My dashboard is missing referrals, filters show incomplete results, or reports show no data**
    a. Check the **Sort** and **Rows** settings. If Rows is set low, some referrals may be on the next page.
    b. Check each referral tab: **Needs Attention, In Progress, New, Unassigned,** and **Outgoing**. Each tab shows referrals with a different status, so a referral may be on a different tab than you expect.
    c. Refresh the page.

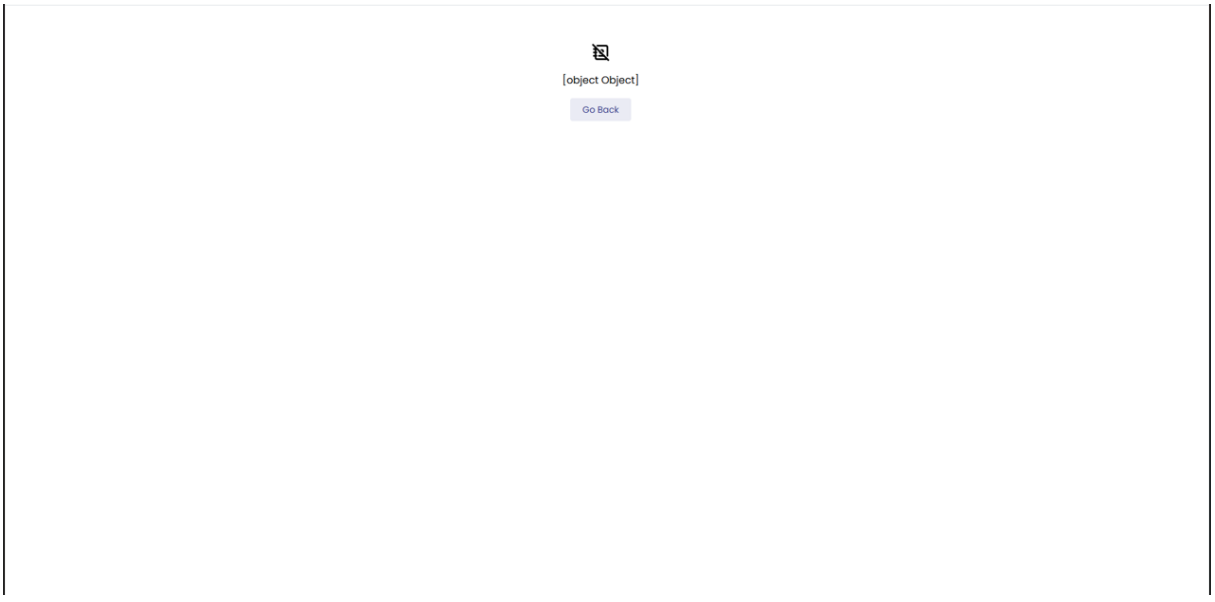
d. If something is still missing, **submit a ServiceNow ticket** with a screenshot of your dashboard and filter settings, and the referral you expected to see (if you know it).



The referral tabs (left) and the Sort and Rows settings (right) on the dashboard.

Account, Roles and Permissions

14. **[Access & Permissions] I see an "Object Object" error**
    a. This error usually means your account's role or permissions are set up incorrectly. You can't fix this yourself, but once RCIT corrects your account setup, the app works as expected.
    b. **Submit a ServiceNow ticket** with your name, email, agency or department, the page you were on, and a screenshot of the error.



15. **[Access & Permissions] I can't open referrals or profiles, staff are missing from the assignment list, or (as a supervisor) I can't see my staff list**
    a. These are usually caused by role or permission settings on a user's account, not a problem with the app.

b. **Submit a ServiceNow ticket** (supervisors can submit one for their staff) with each affected person's name, email, agency or department, and what they need access to, such as surveys, referral assignment, or the staff list.

Record Cleanup

16. **[Data Issue] I need to remove outdated referrals or test records**
    a. **Submit a ServiceNow ticket** that includes the first name, last name, and DOB for each record that needs to be deleted, plus a link to each profile (if there is one).

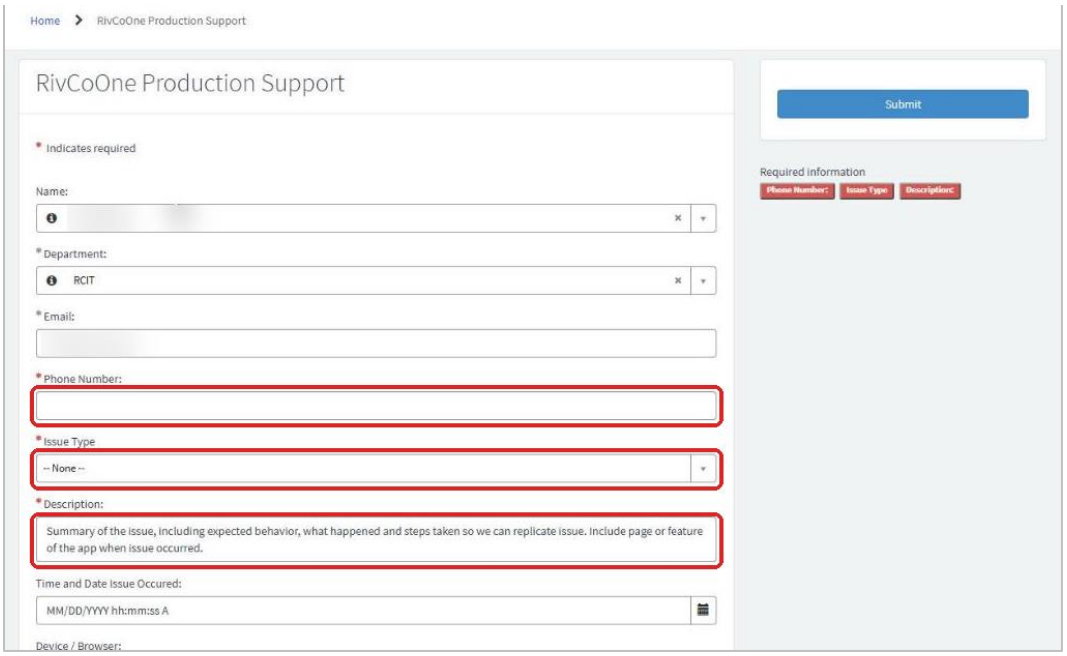
Submitting a ServiceNow Ticket

Submit a ticket when:

- A tip in this guide tells you to.
- You've tried the steps for your issue and it still isn't fixed.
- You see an error message that isn't covered here.
- You need records merged or deleted, or a user's role or permissions changed.

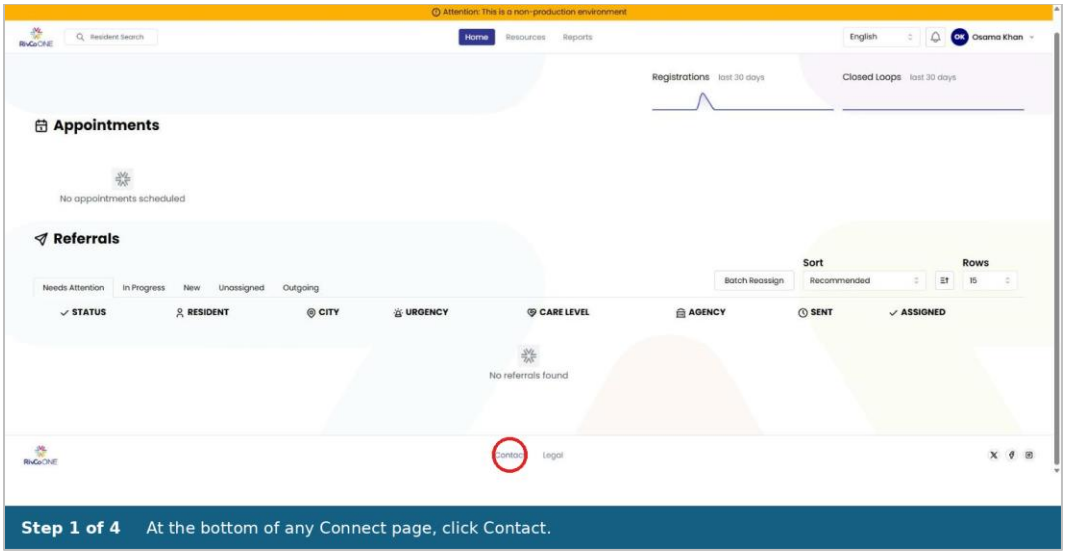
How to submit a ticket

1. At the bottom of any RivCoONE Connect page, click **Contact**. The **RivCoONE Support Portal** opens in a new tab. If you're asked to sign in, use your county account.
2. Click **Open a RivCoONE Support Case**.
3. Your Name, Department, and Email fill in automatically. Check them, then enter your **Phone Number**.
4. Choose an **Issue Type**: Data Issue, Functionality, System Failure (App crash or Error Code), Not able to login, Change / Enhancement, or Usage Guidance. Use the same type as the label on the tip you followed.
5. In **Description**, explain what you expected, what happened, and the steps you took, including the page or feature you were on. Include the details listed below.
6. If you can, fill in **Time and Date Issue Occurred** and **Device / Browser**.
7. Click **Add attachments** to add screenshots or a screen recording, then click **Submit**. Save your ticket number for follow-up.



The RivCoONE Production Support form. Phone Number, Issue Type, and Description are required.

Matching client profiles: To ask for client profiles to be matched by RivCo ID, choose **Client Profile Manual Match Request** on the portal home page instead. It asks for your supervisor or manager's name and the RivCo ID(s) to match.



VIDEO V5: *Opening a support case from the Contact link (13 sec).*

What to include in your ticket

- Your name, email, and agency or department.
- The site you were using (for example, https://connect-stg.rivco.gov/).
- The tip number from this guide that you tried, if any.
- The resident's first name, last name, and DOB, plus the profile link.

- The referral link, if a referral is involved.
- What you were doing, what you expected, and what happened instead.
- The exact text of any error message, and the date and time it happened.
- Screenshots or a short screen recording.

> **Protect resident privacy:** Don't include Social Security numbers or other sensitive details beyond the name, DOB, and links listed above. Crop or blur sensitive information in screenshots.