Quick Guide for FHR Navigator
Case Tracking

Contents

Note:

This EconSys FHR Navigator Quick Guide is provided for the use of those agencies that have licensed one or more of the Case Tracking functions. If your agency does not currently license a Case Tracking function the features and screens discussed here will not be visible as described.

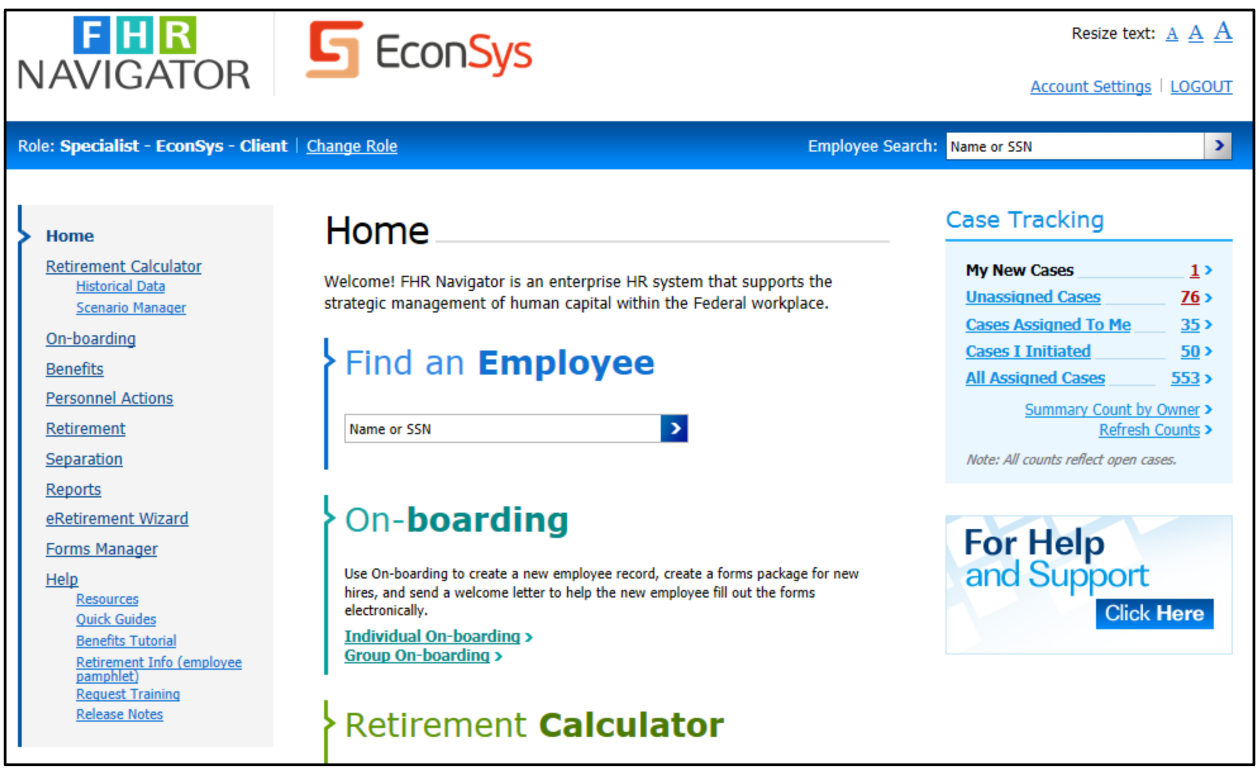
Screen depictions may include other functions and links that your agency does not subscribe to. Also, screen design may vary slightly from that shown here.

Case Tracking in FHR Navigator

Case Tracking allows HR users and employees to track the progress of an action being processed. This feature also allows tracking of workload and types of work being performed and how much time is spent on each case. In a sense Case Tracking is similar to a specialized email system, including the ability to attach documents to messages. Click on an item to open it and then you can view the case history, reassign the case, add comments, add a step, or upload attachments.

Work in the system is broken down by "Case Type." **Notice that the term "Case Tracking" does not appear on the left side menu** in FHR Navigator. Each agency has different Case Tracking case types and will have a different left menu. Different *roles* within your agency may also have different *access* to case types. Agency case types *are* displayed in the left menu, and at this time possible case types include: On-boarding, Benefits, Personnel Actions, Retirement, Separation, Transfer, Recruitment, and Performance. The explanations given in this Quick Guide apply to all case types listed.

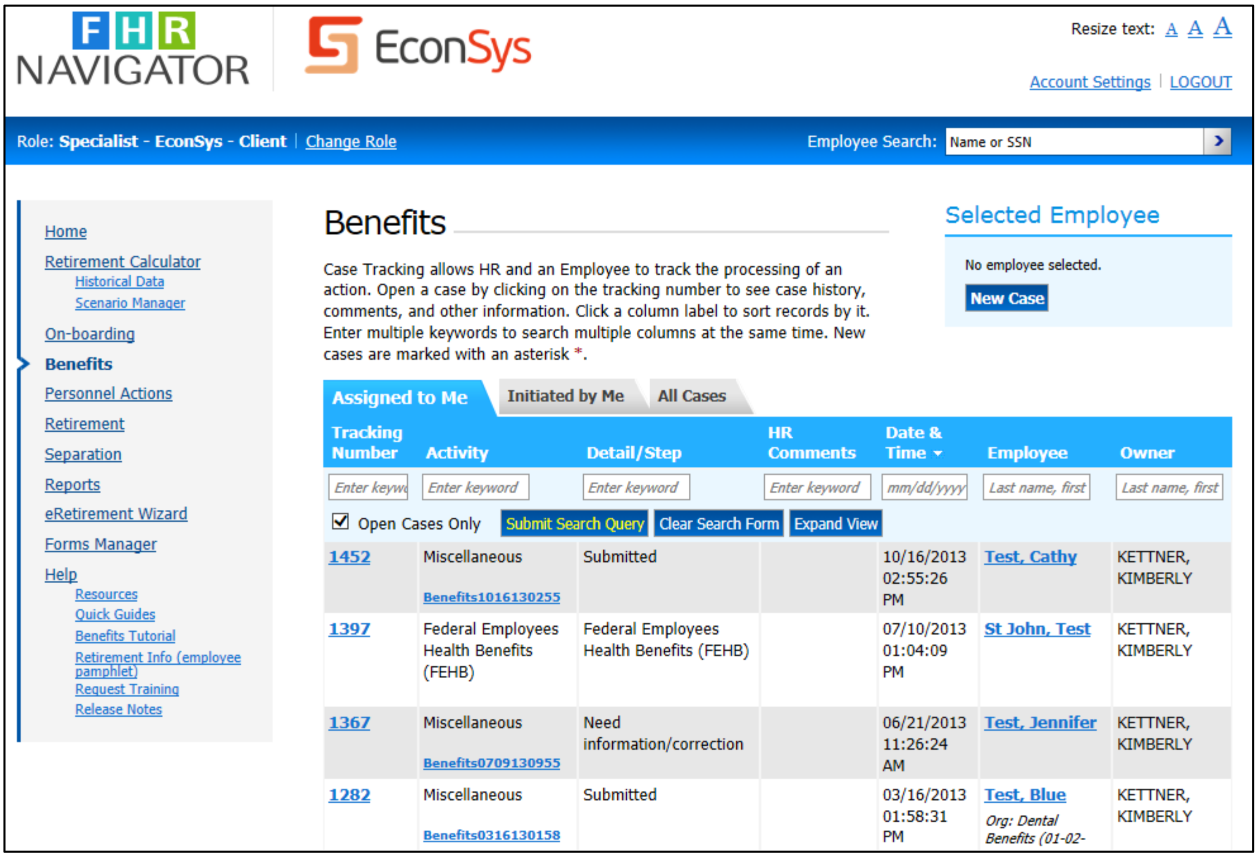
On the home page there is a section on the right labeled "Case Tracking" which allows you to view all case work, regardless of the case type, in one common report box. It also displays a quick report on the number of open items.



The Home Screen: In the example above, "On-boarding," "Benefits," "Personnel Actions," "Retirement," and "Separation" are case types and represent types of work that can be processed in the system. To view all work in a common inbox, click on the links of the case type on the home page on the *right side* of the screen.

An individual piece of work is called a "Case Tracking Item" and is assigned to an "owner" to be worked on. To see a list of outstanding case tracking items, click on the appropriate HR *function* or *case type* in the left menu.

Click on an item in the left menu to view a listing of cases that match the item. For example, clicking on "Benefits" displays all Benefits case tracking items that are assigned to you.



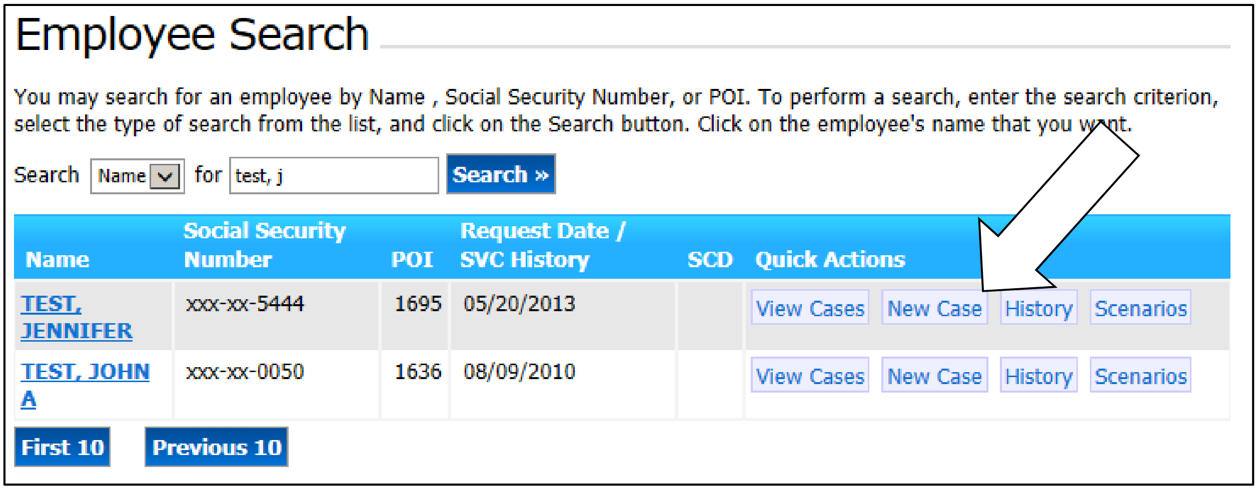
Case List: The example above shows the list view of case tracking items. In this example, the cases are Benefits cases.

- On the *Home* screen, search for the employee.
- Click on *"Cases Assigned to Me"* on the right side under Case Tracking.
- The *"Cases Assigned to Me"* list displays, on a screen labeled "Case Tracking."

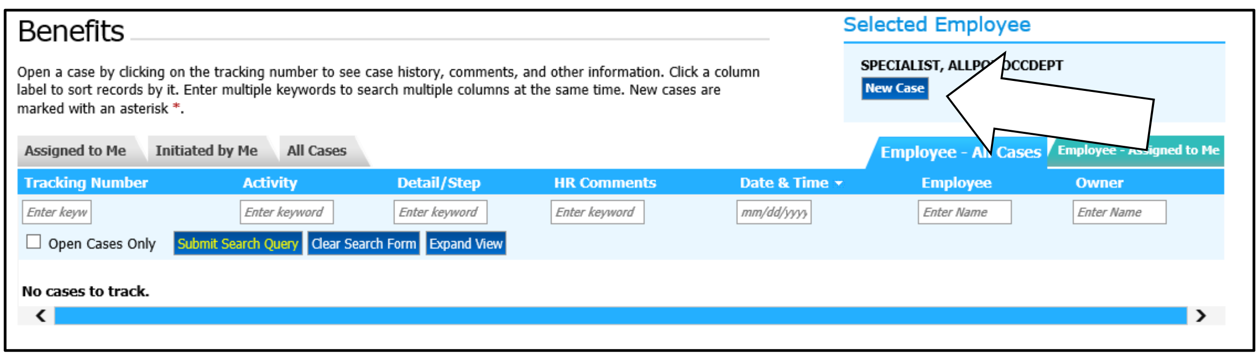
Create a New Case

Cases are usually created on behalf of employees or in order to facilitate communication with employees. Creating a case will also allow you to create forms for an employee to fill out.

1. Search for the employee record that you need to work with. The employee search appears on every page in the upper right.
2. In the search results page, there is a shortcut to create a case under 'Quick Actions'. If you choose this shortcut, you may skip to step 6.

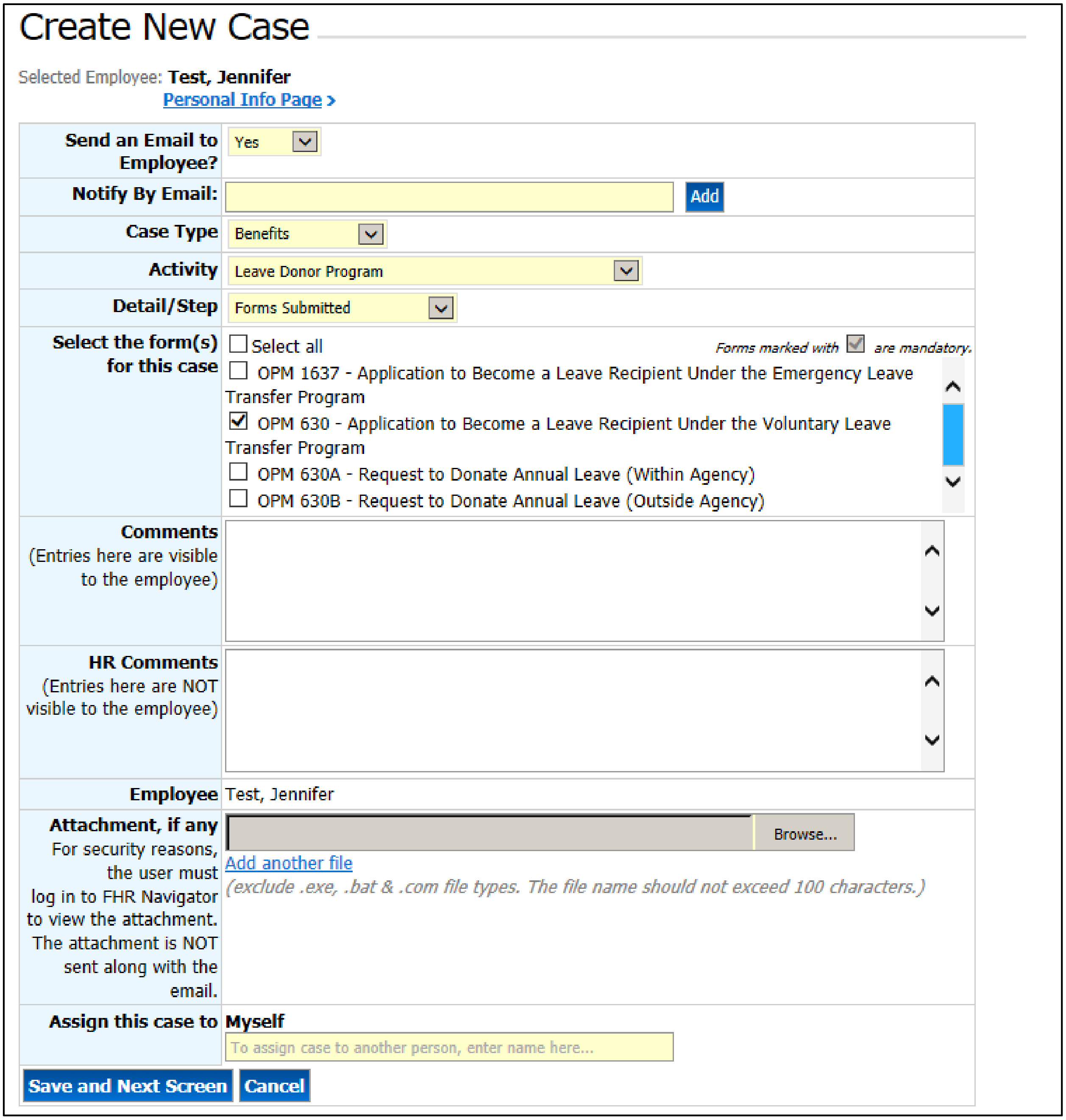


3. Click on the name of the employee to review the personal information screen and make sure you have selected the right record.
4. Click on the appropriate case type in the left menu (e.g., Benefits) for the type of work to be done. This displays case tracking items for the selected function. To make sure a duplicate item does not already exist, click on one of the green tabs; either “Employee – All Cases” or “Employee – Assigned to Me.”



5. Click on the ‘New Case’ button in the right to create a new case.

6. This brings you to the Create New Case screen (illustration next page).
    a. Select “yes” or “no” to designate whether or not the selected employee is to receive an email notification of the case initiation, if applicable.
    b. Add email addresses, as needed, to notify any stakeholders of the work being performed.
    c. Modify the Case Type if needed, and then select the Activity. The Activity is a sub-category for Case Type. The items on this drop-down menu are stipulated by your agency.
    d. Select a Detail/Step. These also vary by agency, and are pre-populated for convenience of users.



Create New Case screen.

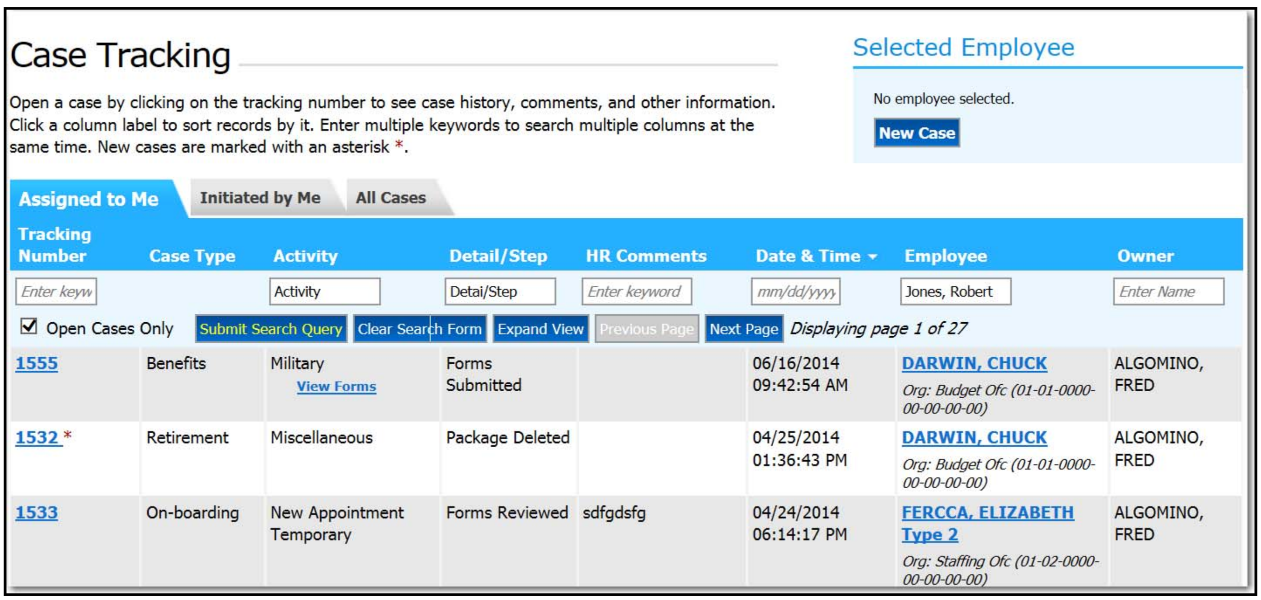
7. Select appropriate forms, if needed. Available forms vary depending on the Case Type and Activity selected. *Your agency determines which forms are available for your Case Types and Activities*. **If you cannot find the form you need, first check the 'Miscellaneous' activity, if available. If the form is not listed, contact your FHR Navigator Administrator or contact support@econsys.com.**
   a. Enter "Comments" to explain the purpose or other pertinent information about the case.

8. Make any HR comments in the appropriate box. Employees will not see these comments if they are entered in the box labeled "HR Comments."
    a. Attach documents relevant to the case being created by clicking on the "Browse" button**. Note: Attachments are accessible to the employee only if employees are allowed to access FHR Navigator.**
    b. By default, the case will be assigned to you, but you have the option to assign it to a different HR Specialist, if needed.
9. Click "Save and Next Screen" to create the case.

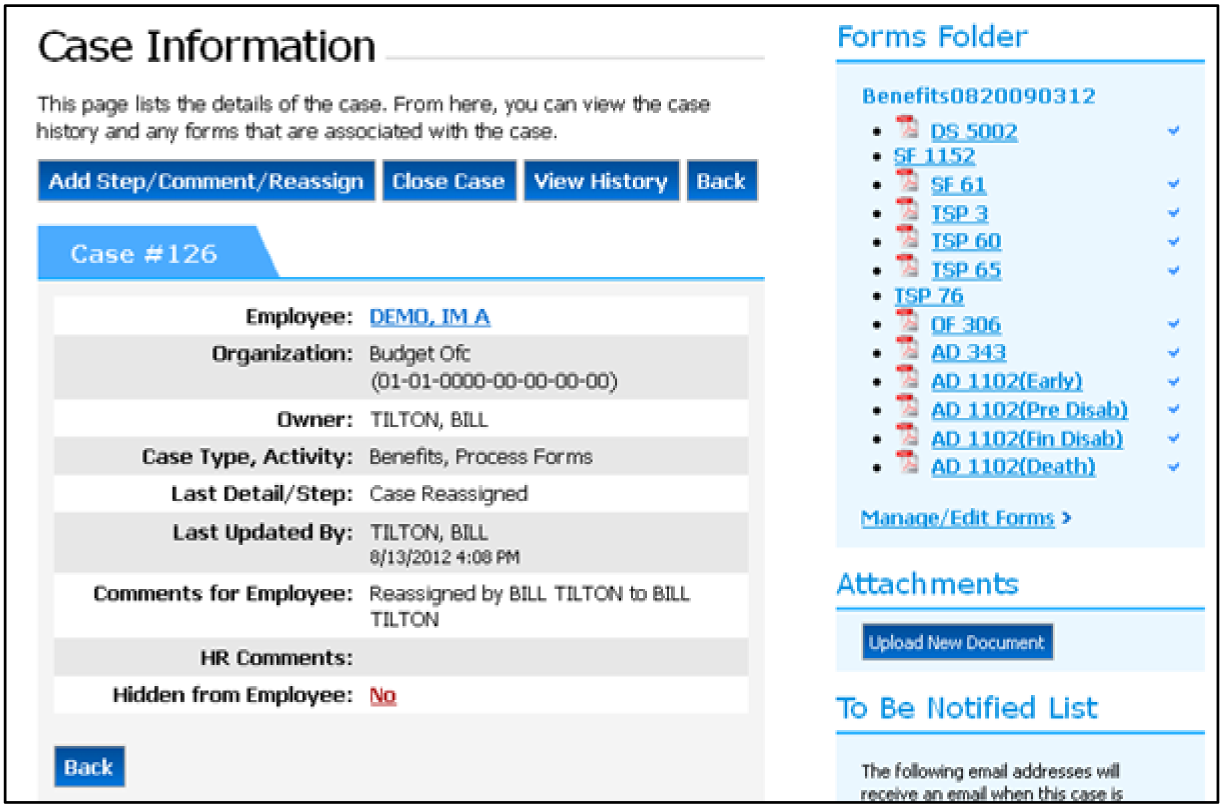
Search for, View, and Edit Cases

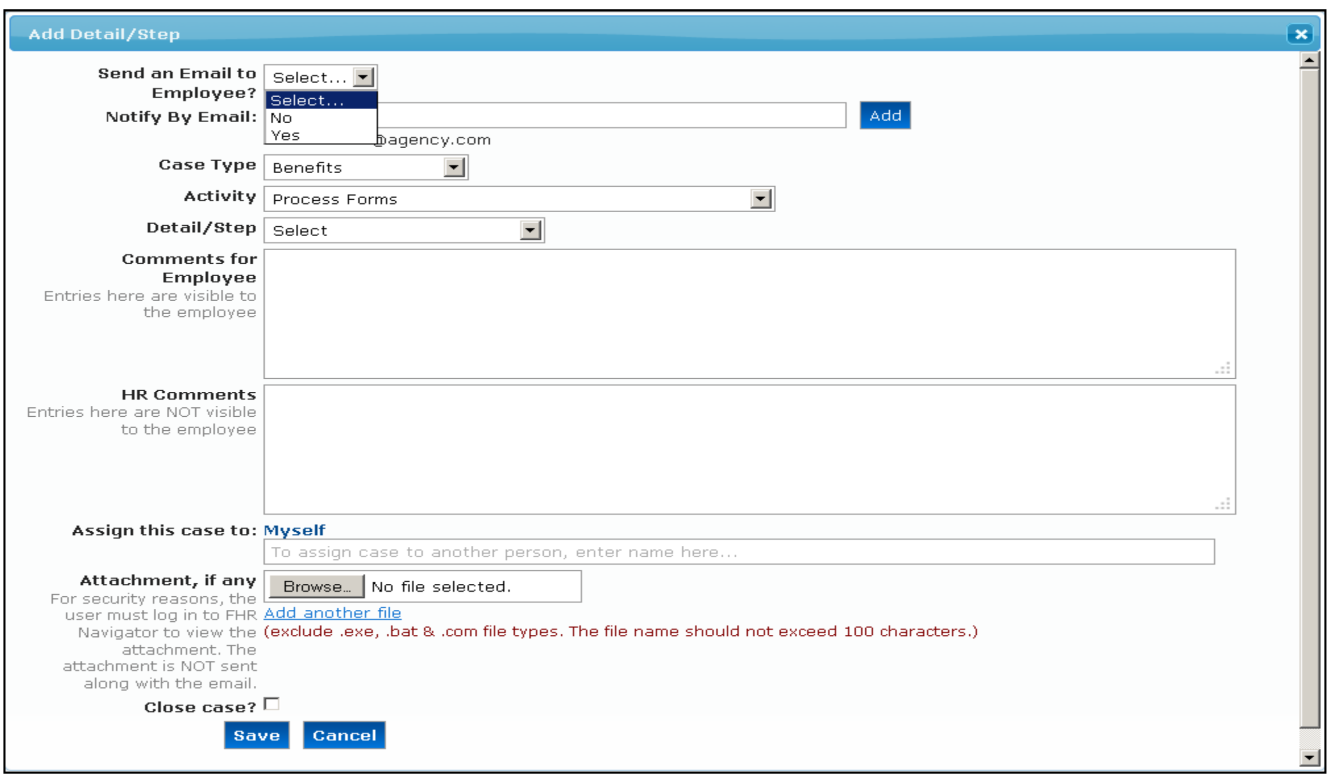
To view and search for cases, click the appropriate Case Type in the left menu to get a listing of cases assigned to you.

1. In the "Cases Assigned to Me," select a case by clicking on the "Tracking Number" in the first column. **You can also search for a case by using the search query**. See the "Submit Search Query" button in this illustration. In the search criteria boxes above these buttons, enter a key word under Tracking Number, Activity, Detail/Step, HR Comments, Date and Time, Employee, or Owner. Then click "Submit Search Query." For a new search, first "Clear Search Form."



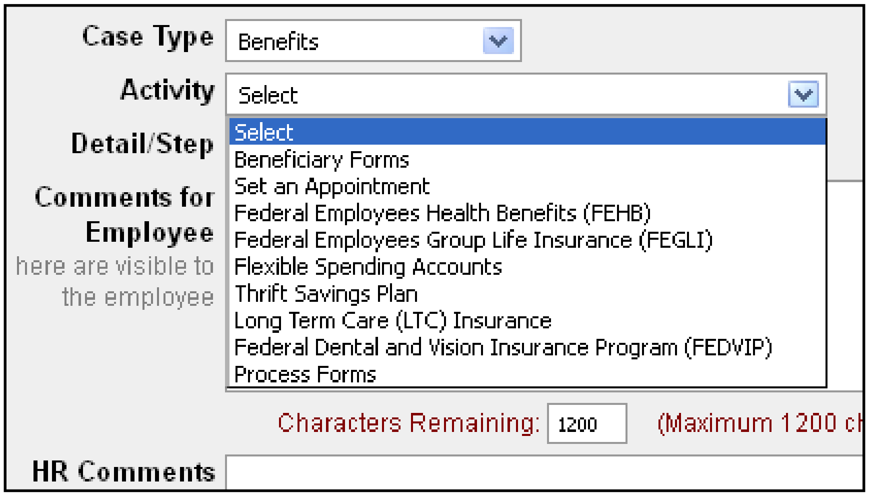
2. The "Case Information" screen appears (illustration next page).
3. Note the action buttons on this screen. You can *add a step or comment, reassign the case, close the case, view the case history, attach documents, and select persons to be notified when a case action is taken*. On the right side of the screen is a list of forms associated with the case, if any.
4. Click on "Add Step/Comment/Reassign."
5. The "Add Detail/Step" screen displays. You will notice this is nearly identical to the "Create New Case" screen.


Case Information
This page lists the details of the case. From here, you can view the case history and any forms that are associated with the case.
Add Step/Comment/Reassign
Close Case
View History
Back
Case #126
Employee: DEMO, IM A
Organization: Budget Ofc (01-01-0000-00-00-00-00)
Owner: TILTON, BILL
Case Type, Activity: Benefits, Process Forms
Last Detail/Step: Case Reassigned
Last Updated By: TILTON, BILL 8/13/2012 4:08 PM
Comments for Employee: Reassigned by BILL TILTON to BILL TILTON
HR Comments:
Hidden from Employee: No
Back
Forms Folder
Benefits0820090312
DS 5002
SF 1152
SF 61
TSP 3
TSP 60
TSP 65
TSP 76
OF 306
AD 343
AD 1102(Early)
AD 1102(Pre Disab)
AD 1102(Fin Disab)
AD 1102(Death)
Manage/Edit Forms
Attachments
Upload New Document
To Be Notified List
The following email addresses will receive an email when this case is

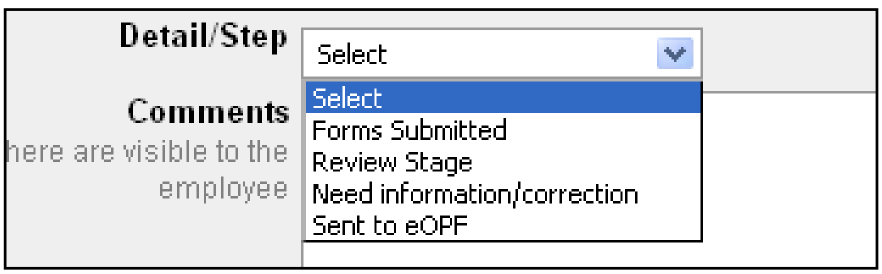

Add Detail/Step
Send an Email to Employee?
Select...
Select...
No
Yes
Notify By Email:
Add
@agency.com
Case Type
Benefits
Activity
Process Forms
Detail/Step
Select
Comments for Employee
Entries here are visible to the employee
HR Comments
Entries here are NOT visible to the employee
Assign this case to: Myself
To assign case to another person, enter name here...
Attachment, if any
For security reasons, the user must log in to FHR Navigator to view the attachment. The attachment is NOT sent along with the email.
Browse...
No file selected.
Add another file
(exclude .exe, .bat & .com file types. The file name should not exceed 100 characters.)
Close case?
Save
Cancel

Select whether or not to send an email to the selected employee, and set the Case Type from the drop-down menu.

Here is an example of activities that might be listed on the "Activity" menu.



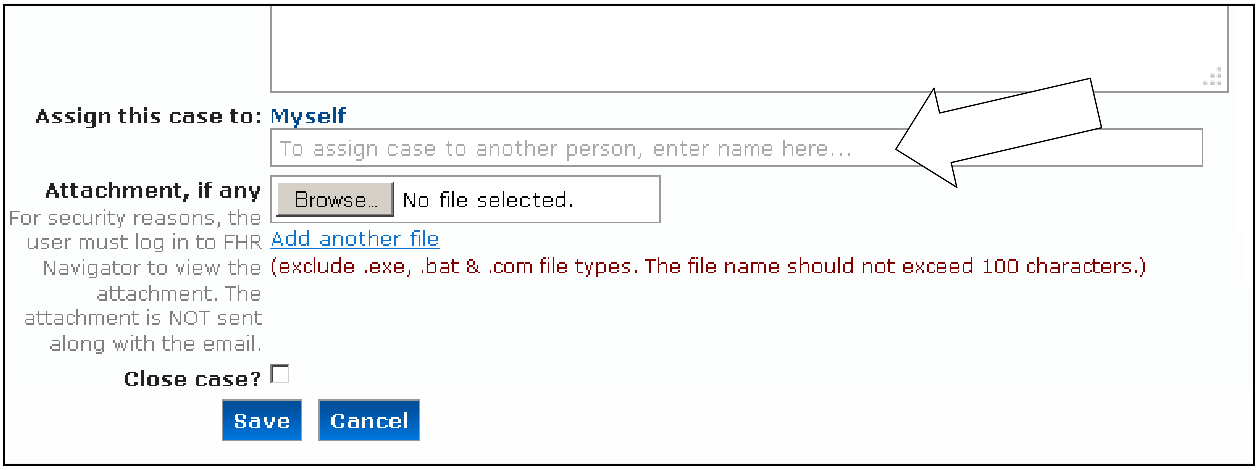
After selecting the "Activity," choose a "Detail/Step" from the next drop-down menu. This is an example of a typical "Detail/Step" menu. ***Menu items depend on the selection made for "Activity."***



Depending on roles assigned, (typically HR administrator, manager, or supervisor) users may also select "All Assigned Cases" or "Unassigned Cases" on the Home screen right side menu. These roles may also have permission to reassign a case to someone else. Users who have those permissions will see the "Reassign" button when they select a case and the "Case Tracking Details" screen opens. The next section explains how to use these options.

Reassign or Assign a Case

1. On the “Add Detail/Step” screen, begin entering the name in the blank field for “Assign this case to:”



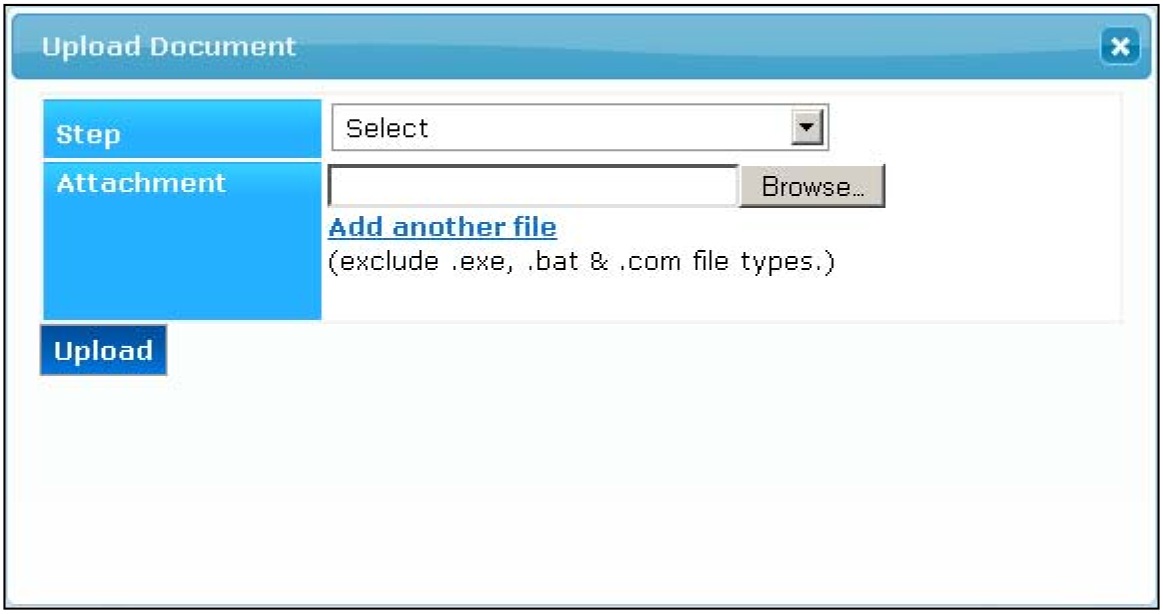
2. A list of eligible recipients displays.

3. Select the name of the person to whom the case is to be reassigned.
4. Enter comments to the employee, if desired.
5. Enter comments to the individual to whom the case is being reassigned.
6. Click on “Save.” The case will appear in “Cases Assigned to Me” for *that individual*.

Add an Attachment to a Case

From the Case Information screen (illustration on page 7)

1. On the right side menu, under “Attachments,” click on “Upload New Document.” The “Upload Document” screen displays (illustration on next page).
2. Select the “Step” and “browse” for the document in your computer folders or on your network.
3. Click on “Upload.”



On the Add Step/Comment/Reassign screen (of the Case Information screen)

You can *add attachments* while also adding comments or reassigning the case.

1. Click on the Add Step/Comment/Reassign button to display the "Add Detail/Step" screen.
2. On this screen the final field is labeled "Attachment, if any." You can add up to 10 documents at a time. Click "Add another file" to enable the ability to select an additional document to upload.
3. Click the "Browse" button to the right of this field to open the folders on your computer or network, and locate the document(s) to be attached.
4. Select the document(s).
5. Click "Open."
6. Complete the rest of the page as described above.
7. Click "Save" to send save and send the case, if being reassigned.

Forms Manager and Case Tracking

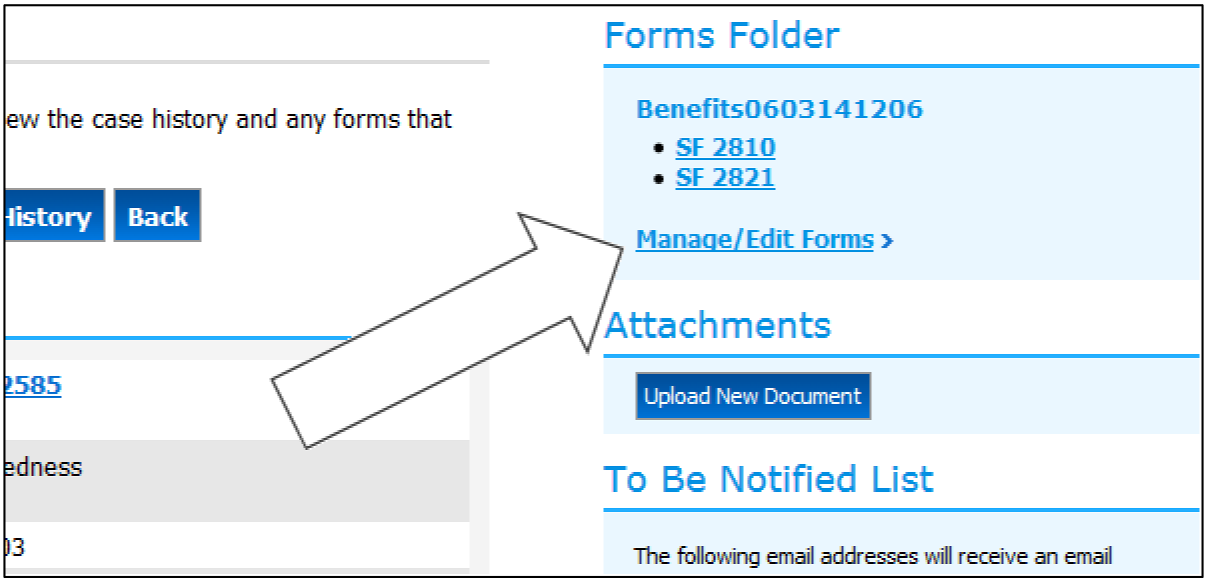
If your agency is using Case Tracking, then you will notice that Forms Manager is integrated into Case Tracking. **In order to create forms, you must create a case**. When you create a case, a list of appropriate forms for the selected case type and activity will automatically be displayed. For example, when you select "Retirement," then "FERS,'" you will see the SF-3107 form and other related forms (note this example may vary depending on how your agency has chosen to configure Case Tracking).

Administrators in FHR Navigator can change the list of forms associated with each case type and activity by clicking on "Case Type, Activity and Forms" in the left menu in *User Account Administration*.

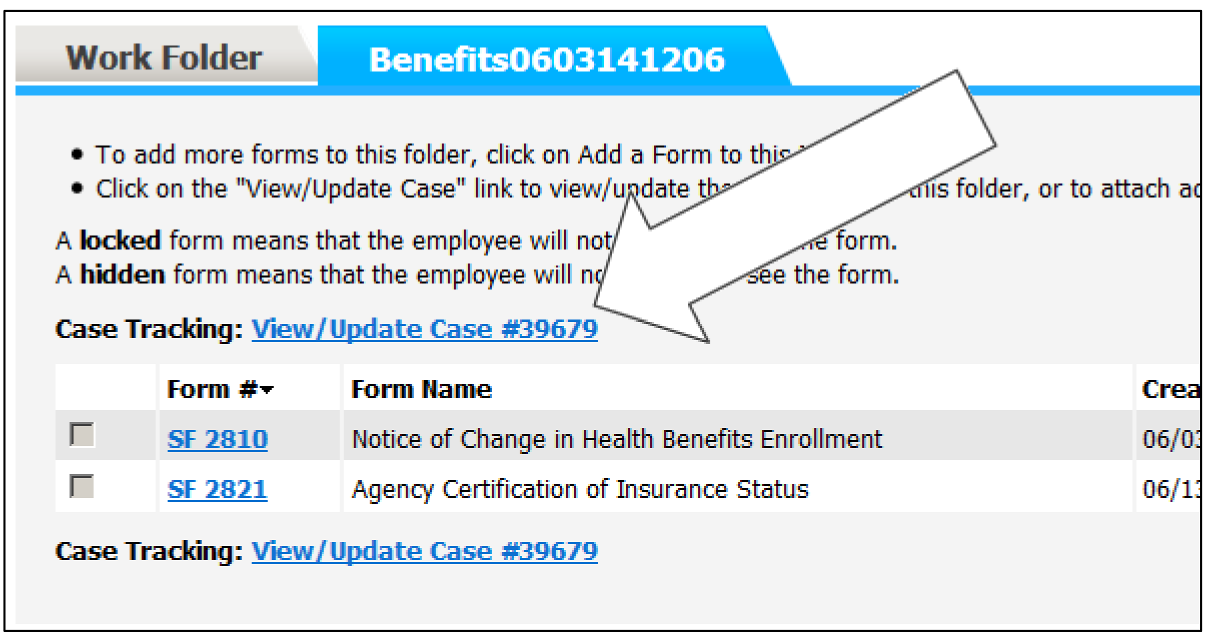
Managing Forms Associated with a Case

When you open a case, you will see any forms associated with the case on the right. Click on "Manage/Edit Forms" to complete any of the following tasks (provided your role grants you permission to do so):

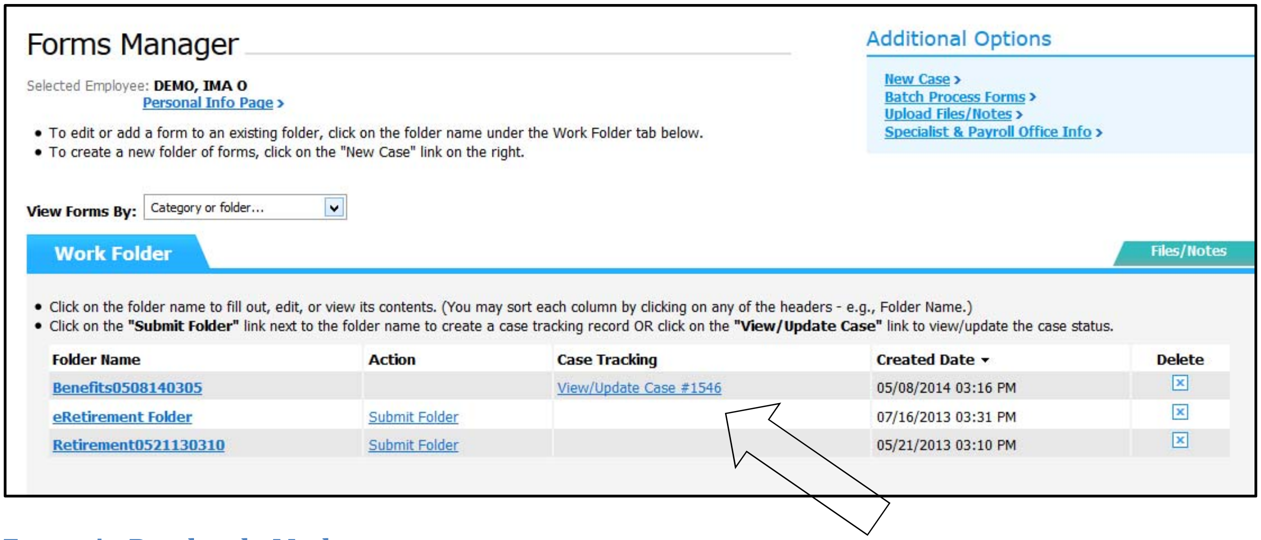
- Add additional forms
- Delete forms
- Lock forms so that the employee cannot edit them
- Hide forms so that the employee cannot access them at all
- Select multiple completed forms and download them as a single PDF file



The Manage/Edit Forms link toggles you to Forms Manager, where you additional control over the forms. To toggle back to the Case Information page, click the View/Update Case # link.



You can also access all forms for a selected employee by clicking on "Forms Manager" in the left menu. If there is a case associated with the forms, you can click the "View/Update Case#" link to reassign the case or add comments.



Forms in Read-only Mode

You must be the owner of the case in order to edit any forms attached to a case. If you do not own the case and associated forms, you will see a red message, "You are viewing this folder in read-only mode." You can go to the case information page and click the "Reassign" button to assign the case to yourself so you can edit the forms.

Controlling Employee Access to Cases

Employees cannot own cases. Employees cannot be assigned to work on cases. However, if employees have access through "EC" (Employee Center), those employees always have access to any cases and forms associated with themselves except in the following situations:

- The case is marked as **hidden**. Click the "No" link next to "Hidden from Employee" to hide the case from the employee.
- Hidden case types. Some case types are always hidden, such as Employee Relations.
- The individual form is hidden. Click "Manage/Edit Forms" or go to Forms Manager to hide individual forms. Click the "No" link under the appropriate heading to hide a form from the employee.
- The individual form is locked. A locked form may be viewable by employees, but cannot be edited by them. Click "Manage/Edit Forms" to lock or unlock individual forms. Click the "No" link under the appropriate heading to lock a form so the employee cannot edit it.
- When the employee has submitted the folder. When an employee clicks the link to "Submit Folder," all forms in the folder are locked and cannot be further edited by the employee until unlocked by a person in an HR role with access to the forms.

Case Tracking Email Notifications

FHR Navigator can be used to notify stakeholders of the status of items they are working on. The contents of the emails are customized for each agency. FHR Navigator will send email notifications in the following situations:

- **When reassigning a case** – FHR Navigator will send an email to the new case owner to let recipient know that the case has been assigned to him/her.
- **When reassigning a case you do not own** – When a case is reassigned and the previous owner is not the person doing the reassign action, the previous owner will receive an email notification to let him/her know that the case is no longer assigned to him/her.
- **When updating a case – to the employee** – FHR Navigator will send an email to the employee when the case is updated if the person who updates the case chooses "Yes" to send an email to the employee. The notification will include the comments from the regular comments section, but not from the HR Comments section.
- **When updating a case – to the "To Be Notified" list** – FHR Navigator will send emails to all recipients on the "To Be Notified" list when a case is updated. Anyone who has access to a case can add any email addresses to the "To Be Notified" list; however, when the case is updated, the user has a choice of which email addresses should be notified. That is, email addresses on the "To Be Notified" list can be considered a list of recipients who wish to receive updates, but the person who makes the update still has discretion over which email addresses are sent the update notification.

Close or Re-Open a Case

Generally cases can only be closed by the "owner," which is the person in HR to whom the case is currently assigned. Click the "Close Case" button on the Case Information page to close it. While a case is *closed,* it cannot be reassigned and any forms associated with the case cannot be edited. However, closed cases can be reopened. Click the "Re-Open Case" button on the Case Information screen to reopen a closed case.

In some agencies only "owners" who are in Human Resources are able to close cases. If you do not see the "Close case?" check box at the bottom of the "Add Detail/Step" screen, you do not have permission to close cases. To close a case, reassign it to an FHR Navigator user who does have this permission.

To view closed cases, go to the appropriate case listing page (e.g., Benefits), and then uncheck the "Open Cases Only" checkbox and press "Submit Search Query".