

## CaseManager

Solving complex and costly HR problems with the integration of a pre-packaged, bolt-on solution for HCM.

### Business Challenge

The administration of employee benefits and providing employees with answers for HR queries and concerns has become extremely complex and time consuming for management staff. Employees are dissatisfied with the response times and management is unhappy with the time and resources spent to compile accurate responses.

A brief survey conducted by LBi of a random sample of customers and local businesses brought the following responses:

- Takes too long to provide HR answers to employee questions
- Cannot apply information learned from previous research to new queries
- Inability to statistically track topics or primary concerns
- Audit trail of particular calls are non-existent
- Difficult to update documentation, manuals and policies with information learned from queries

The survey results coincided with the information we were hearing when we would engage HR managers in discussions of their most pressing concerns and issues.

From the information provided by these high-level managers and executives, LBi crafted the design concept of a comprehensive solution for handling these types of problems that when integrated into the ERP or HR system can accelerate the resolution of HR queries and reduce the associated costs.

### The Solution

CaseManager is a complete, browser-based application providing a comprehensive solution for managing and tracking HR, Payroll, and Benefits calls - from the Customer Service Representatives (CSRs) to the HCM Specialists who support the escalated cases. CaseManager will help to reduce calls over time by identifying policies, procedures, and guidelines that can be presented more clearly. CaseManager provides payback for your investment by reducing the calls and by providing the data necessary to streamline HR policies and documentation.

The screenshot displays the CaseManager web application interface. At the top, there is a search bar with the text "Name (Last, First)" and "Gooden". Below the search bar are navigation tabs: "Main", "View My Cases", "Search Cases", "Reports", "Inboxes", "Help", and "Logout". The main content area is titled "Eugene Gooden" and includes a "Edit Employee Info" button. The interface is divided into several sections:

- Employee Information:** A table with columns for "Personal" and "Job". It contains fields for Full Name (Eugene Gooden), Employee ID (1115), Birth Date (03/23/1971), SSN (300-30-4214), Gender (Male), and Marital Status (Single).
- Contact Information:** A table with columns for "Home" and "Business". It contains fields for Address 1 (455 Main Street), Address 2, City/State/Zip (Long Beach, CA 90801), Country (United States), Phone (313-333-2932), and e-Mail (eugene.gooden@echo.com).
- Case History:** A table with columns for Case #, Open Date, Close Date, Category, Subcategory, and Owner. It lists several cases, with Case # 804 highlighted in green. The cases are:
 

Case #	Open Date	Close Date	Category	Subcategory	Owner
874	06/20/2008	Pending	Employee Information	Placement	Higgins, Philip
803	06/20/2008	06/20/2008	Training	Off Site	Carso, Tina
804	06/20/2008	Pending	Benefits	Health Care	Hartman, Robert
852	06/19/2008	Pending	Training	Off Site	Sanchez, Jill
832	06/19/2008	Pending	Benefits	Health Care	Admin, Default
- Case #804 Detail:** A section for Case #804 with a red warning icon and text: "This case has been marked as paid." It includes fields for Open Date (06/20/2008), Close Date (Pending), Case Received Via (Voicemail), Voicemail Date (06/19/2008), EE Response Via (Phone), Quick Answered (No), Follow Up Date (06/23/2008), Visibility (Normal), and Priority (Urgent). It also shows Category (Benefits), Subcategory (Health Care), Owner (Hartman, Robert), and Originator (Hartman, Robert). A "Problem" field contains the text "Dental care claim denied." Below this are tabs for "Problem", "Resolution", and "Notes". At the bottom of the detail section are buttons for "Save", "Delete", "Mark Closed", "Reassign", "Attachments", "Show Case Changes", and "Print".

At the bottom of the screenshot, the text "©2008-2009 LBi Software Inc. All Rights Reserved" is visible.

**CaseManager provides a comprehensive solution that streamlines case management for employee call centers**

CaseManager lets Customer Service Representatives and associated staff enter and track information about calls, e-mails or questions entered directly into the CaseManager employee portal. CSRs can quickly pull up data about the employee asking the question, review their case history, and enter new cases based on the inquiry. If the CSR is not able to quickly resolve the case, the system automatically forwards it to the appropriate Specialist. In addition, CSRs and Specialists are able to view all relevant cases with the click of a button. Full featured reporting provides authorized personnel both summary and detail reports to reveal where they might be lacking in resources or knowledge base.

### The Benefits

With CaseManager, LBi was able to listen and understand the wants and needs of a customer and design an ideal solution that perfectly meshed with them. By reducing overall problem resolution times and increasing the number of successful calls, CaseManager improves the performance of Customer Service Representatives (CSRs), while increasing employee satisfaction and retention.

CaseManager is developed in JAVA (and is SUN certified). It utilizes BIRT for the reporting component. All reports are also available in graphical formats. The database can be Oracle, SQL Server, DB2 or MySQL.

CaseManager also provides call center management with critical trend analysis to produce valuable metrics such as the reasons for calls, resolution time, CSR effectiveness, training issues and more.

By integrating these metrics with a series of reporting tools, companies can reduce calls over time by identifying policies, procedures and guidelines that need to be presented more clearly. As a result, managers and decision makers can take proactive measures to address potential issues with employee documentation or CSR training. By reducing the volume of calls, CaseManager will provide a valuable return on investment.

As a fully web-enabled, secure application, CaseManager also includes Employee Self-Service features that make it especially useful in environments where representatives are located in multiple sites around the world.



The screenshot displays the CaseManager Employee Access Portal interface. At the top, there is a navigation bar with the LBi logo, the text "Employee Access Portal", and "CaseManager". Below this, there are links for "Help", "Print", and "Logout". The main content area starts with a welcome message: "Welcome to the CaseManager Employee Portal". It indicates the user is logged in as "Eugene Gooden" and has 2 pending cases. A link "Click here" is provided for users with new problems. Below this is a section titled "History of Past Cases" which contains a table of case records. Each row includes a case number, open and close dates, category, subcategory, and the method the case was opened via. A "Cancel" button is visible next to each row. The table data is as follows:

Case #	Open Date	Close Date	Category	Subcategory	Case Opened Via
886	06/20/2008	Pending	Employee Information	Placement	Phone
<b>Problem:</b> Employee is in process of moving and would like to transfer office locations. <b>Resolution:</b> Meeting set up to discuss employment options at other office. Forms should be resubmitted pending approval.					
874	06/20/2008	Pending	Employee Information	Placement	Voicemail
803	06/20/2008	06/20/2008	Training	Off Site	Email
804	06/20/2008	06/20/2008	Benefits	Health Care	Voicemail
832	06/19/2008	06/20/2008	Benefits	Health Care	Phone
852	06/19/2008	06/20/2008	Training	Off Site	Phone
854	04/16/2008	05/21/2008	Benefits	Retirement	Phone
851	03/07/2008	04/11/2008	Performance Mgmt	Employee	Phone
853	12/18/2007	12/23/2007	Benefits	Sick / Holidays	Phone

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**CaseManager Employee Access Portal**  
 Employees can enter their own questions and check case status