LBi HR HelpDesk:

ENTERING A CASE

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LBi Software

LBi HR HelpDesk makes it easy for HR team members and employees to accurately enter new cases using features that can boost user adoption, increase employee engagement, and ensure that your organization complies with all relevant federal regulations.

Employees can create cases on their own, either through the Web or by sending an email directly to the LBi HR HelpDesk system. The system, meanwhile, has administrative features to ensure that it routes confidential cases (e.g., harassment or manager-dispute cases) only to strictly authorized personnel. It also safeguards against not complying with HIPAA, PHI, PII, and safe harbor regulations.

This guide will lead you step by step through entering a new case and selecting the proper options to ensure employee privacy and confidentiality.

Three Options for Creating a Case

LBi HR HelpDesk allows cases to be entered from the Employee Self-service portal, by email, or directly within the application itself.

- **Employee Self-service Portal**
  Employees log in to a separate portal where they can view common problems and resolutions. If the employee cannot find the scenario that addresses their issue, they can enter a new problem and submit a case with attachments, if applicable. The case is automatically created and available for viewing and management by HR users in the LBi HR HelpDesk Main Application.

- **Email**
  An employee may send an issue or question via email to a designated address that is linked to the LBi HR HelpDesk Main Application. The system will automatically create a case for that specific employee based on a match of the originating email address and the address in the Employee Profile.

  The system will categorize the case based on the email subject line. If the system cannot identify the employee by the incoming email address, the system will forward the email with a notification to the System Administrator's email address indicating that a case was not created due to an unknown email address.

  The case can then be entered manually by an HR user once the employee has been identified. If no matching category/subcategory is found, the system will categorize it as *Other/Other* and an HR user can update the case as needed.

- **Within LBi HR HelpDesk**
  This is where HR Admin and CSR users log in to the Main Application, select the desired employee, and enter the applicable case details.

The rest of this guide explains the process for creating a new case in the Main Application.

A. Selecting the Employee

1. Log in to LBi HR HelpDesk.

The Clipboard will be displayed with any cases that have been assigned to you.

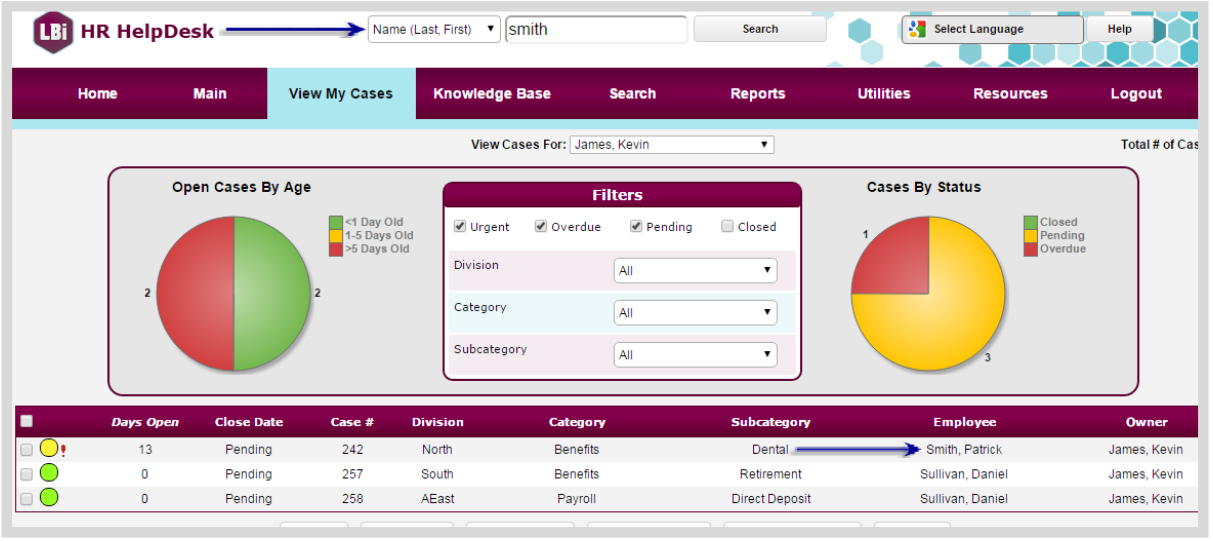
2. Select the desired employee by using one of the methods below.

- Use the Quick Search option at the top of the screen to locate the employee by Name, Employee ID, or SSN. The "Sounds Like" feature may be used if you are unsure of the proper spelling.

- Select the case if the desired employee is visible on the screen.

The Main Screen will be displayed for the selected employee.

3. Click the New Case button to display the New Case Entry screen.

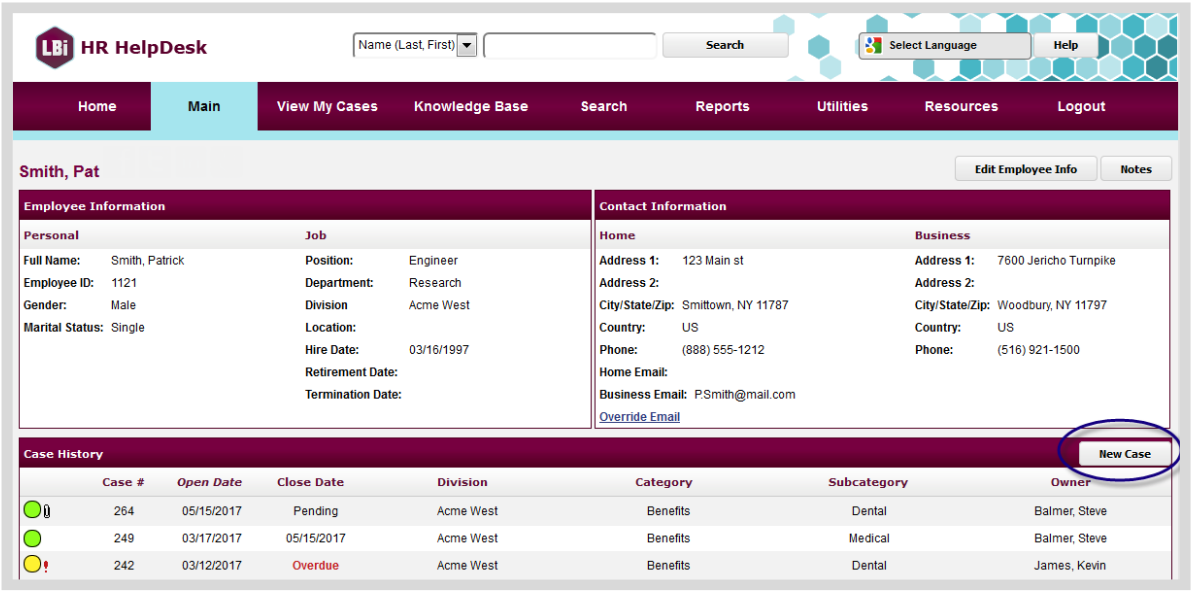


B. Entering the New Case Details

1. Select the Division, Category, and Subcategory.

- Select the Division to *display the available Categories within that Division.*

- Select the Category to *display all of the available Subcategories for that Division/ Category combination.*



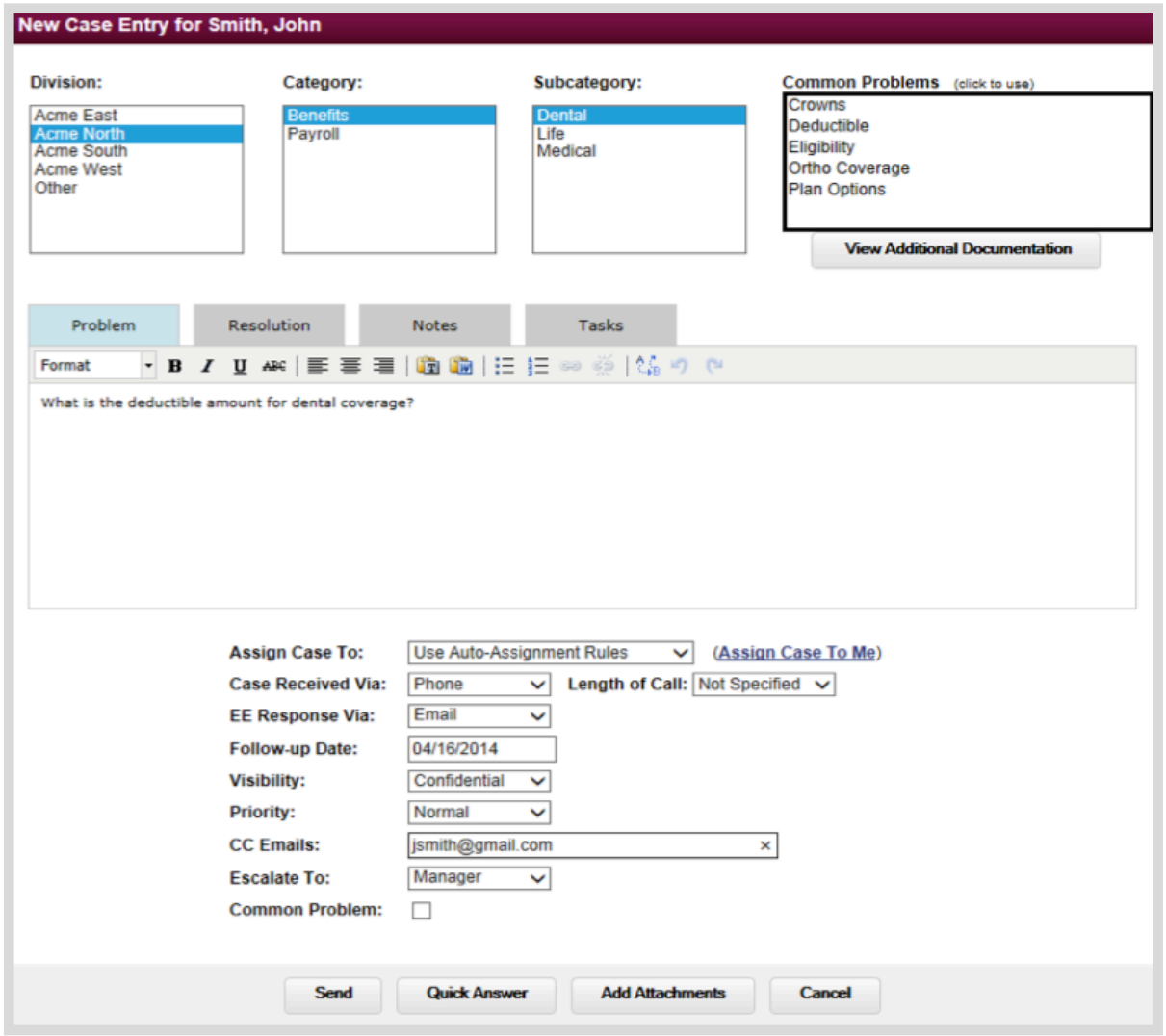
Any Common Problems available for the selected combination of Division/Category/Subcategory will be *displayed in the Common Problems section.* Placing the mouse over the name will display a pop-up showing both the Problem and Resolution. If selected, the Problem and Resolution text will populate in the Problem and Resolution tabs for easy entry.

2. Select a Common Problem, if applicable, or enter the issue in the Problem text box.

3. On the corresponding tabs, enter a Resolution, if known, and any Notes or Tasks.

4. Choose the desired option for each of the selection fields as indicated below.

- **Assign Case To –** You can select Auto-assignment Rules, Assign Case to Me (using the link), or choose another system user or group from the selection list.
- **Case Received Via –** From the drop-down menu, select the method by which the case was received.
- **EE Response Via –** From the drop-down menu, select the method by which the employee would like to be notified.
- **Follow-up Date –** A reminder email will be sent to the case owner on the date you specify.



- **Visibility –** This feature can be enabled or disabled from the Administrator Utility screen. The Visibility setting further restricts the privacy level of the case by determining which users have the capability to view and/or update the case. LBi HR HelpDesk recognizes three categories of users:

  1. **Administrators –** Permits access to all cases, utilities, and functions.

  2. **Managers –** Permits access to view/update "Pending" cases of users who report to them.

  3. **CSRs (Customer Service Representatives) –** Permits access to view/update "Pending" cases that they own.

  The Visibility feature takes this one step further by limiting case view and update capability to only Authorized Users. The application has four Visibility options:

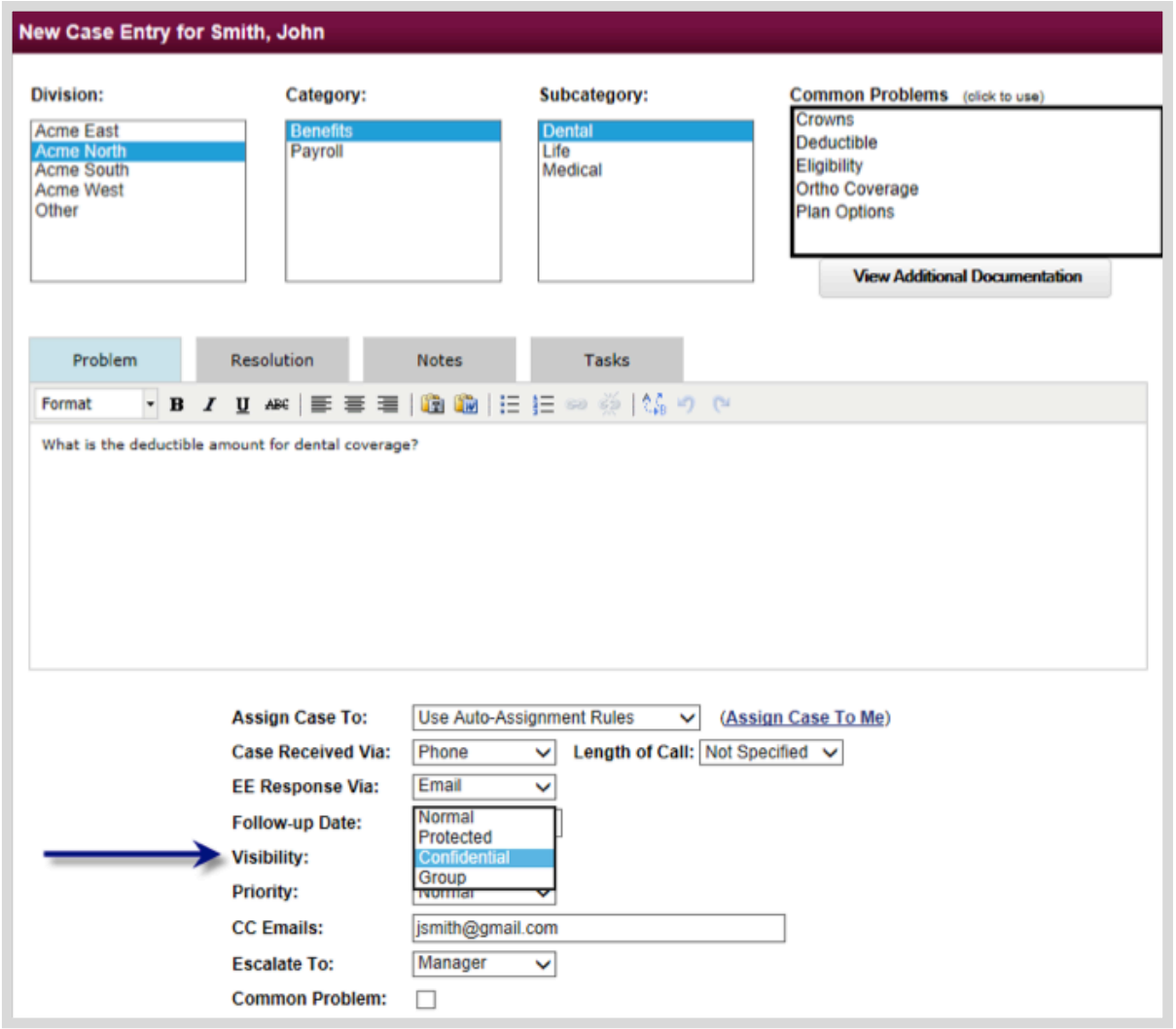
  - **Normal –** Any user can view and update.

  - **Protected –** Any user can view, but only an Authorized User can update. (Authorized Users are the Case Owner, Manager of Owner, or an Administrator.)

  - **Confidential –** Only an Authorized User can view and update. (Authorized Users are the Case Owner, Manager of Owner, or an Administrator.)

- **Group –** Only authorized users can view and update. (Authorized Users are the Case Owner, CSRs Within the Group, Managers of CSRs, or an Administrator.)

Note: Only Administrators or Managers can set the Visibility option of a case.



- **Priority –** Flags the case as Normal, High, or Urgent. Only Administrators or Managers can set the case priority level.

- **CC Emails –** Allows for additional email addresses for employee notifications.

- **Escalate To –** Sends notifications to the owner's manager or another email address, if entered when a case becomes Overdue, based on the Aging Rules.

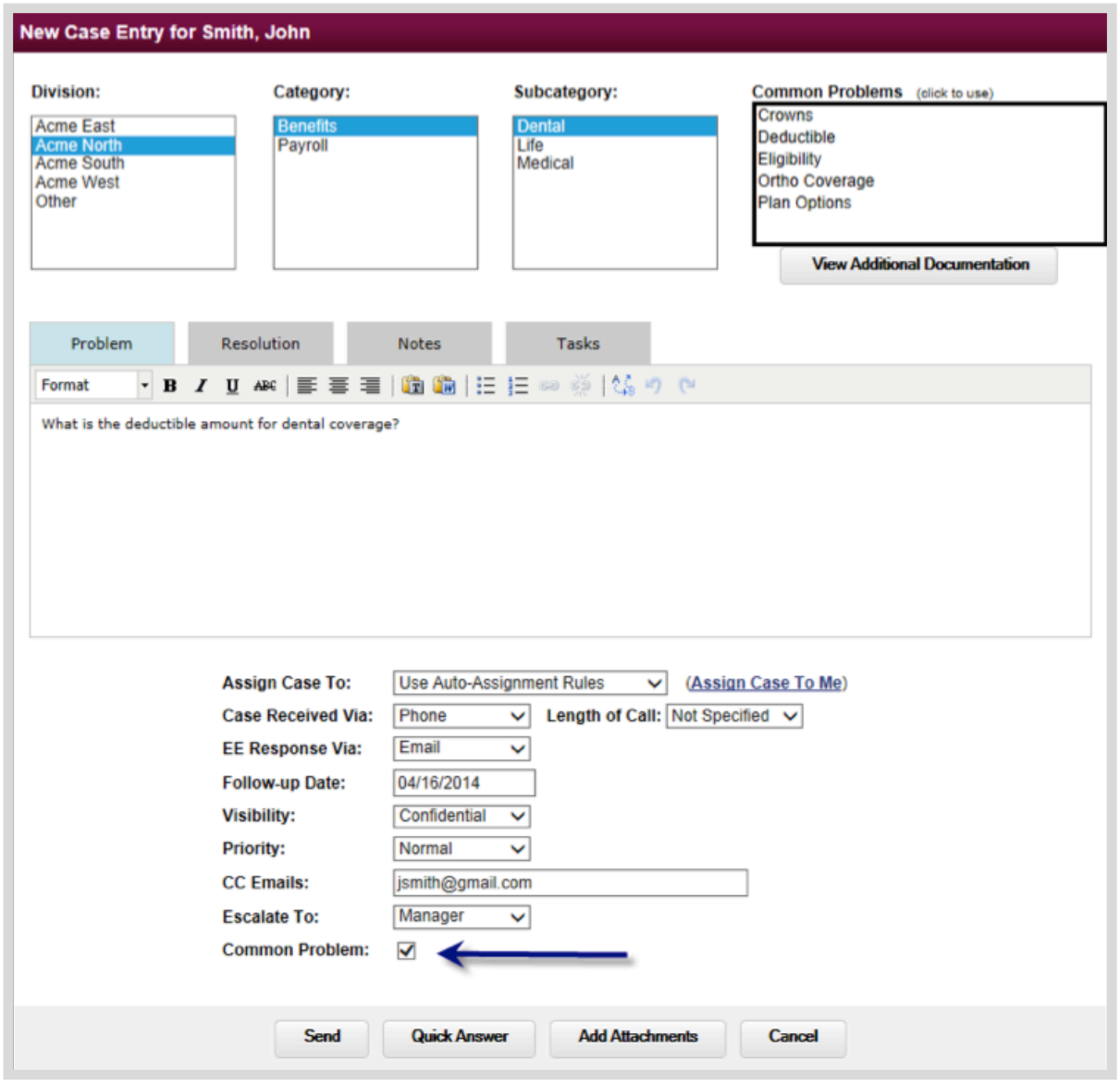
- **Common Problem –** Click this box to submit the Problem/Resolution as a potential Common Problem option in the system. Administrators will review and update submitted entries in the Manage Common Problems Utility. If approved, the Common Problem will be available for selection within the Main Application and/or in the Employee Portal based on the settings.

5. Click the Add Attachments button to include files from the Document Repository or a local drive.

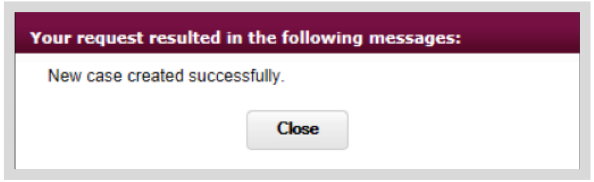
6. Click the Send button to submit and save the case.

7. Click the Quick Answer button if the resolution has been entered and is closed.

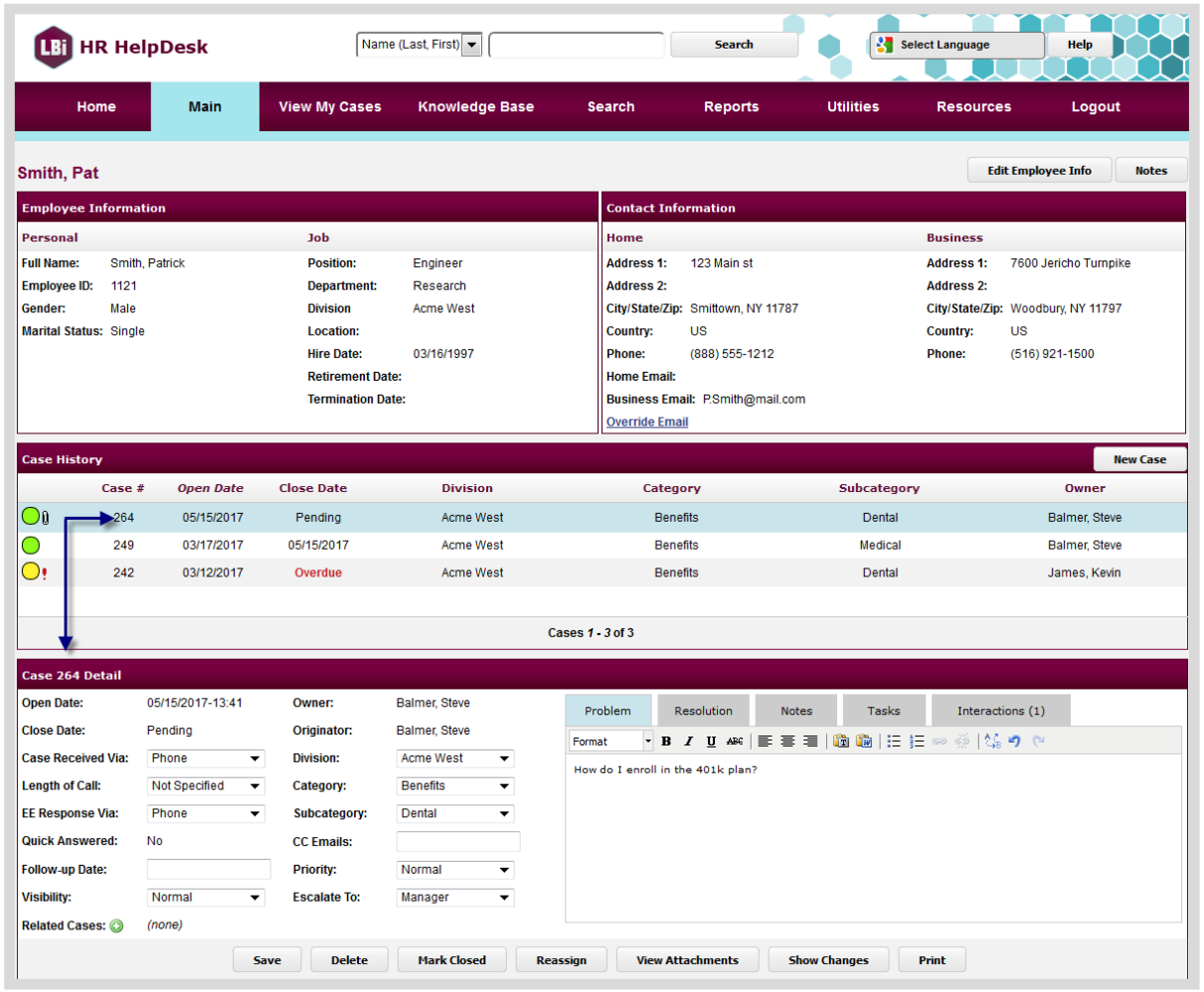
8. Click the Cancel button if you do not wish to save the case.



9. Click the **Close** button once *the confirmation message displays* indicating that the case has been created successfully.



The case will be *displayed on the Main Screen in the Case Detail section* and may be viewed and/or updated only by authorized users.



Regardless of which version of LBi HR HelpDesk you are using, it's crucial to know how HR or an employee can enter a new case, and what HR needs to know to maintain employee privacy and confidentiality. These are among the first steps toward challenging yourself and your organization to transform HR. **Download a brochure** or visit the **LBi HR HelpDesk page of our website** for complete details, including the features of each version of LBi HR HelpDesk, pricing after the trial periods end, and a guide to determine which option is right for any SMB user.

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