LBi HR HelpDesk:

USING THE EMPLOYEE SELF-SERVICE PORTAL

FREE	✓ PRO	✓ PROPLUS	✓ ENTERPRISE

LBi Software

Using the LBi HR HelpDesk Employee Self-service Portal

LBi HR HelpDesk Pro, ProPlus, and Enterprise offer a self-service portal that empowers employees, makes HR more efficient, and heightens employee engagement. Employees can view common problems and resolutions in an FAQ format, submit new cases, and review the activity and history of any of their cases.

Using the system's Interactions feature, employees can communicate directly with the HR staff member handling their case. They can also include attachments within a newly submitted case or case interaction.

This Product Guide provides step-by-step instructions for using the LBi HR HelpDesk Employee Self-service Portal to:

A. View Available Case Information
B. Review Common Problems
C. Submit a New Case
D. Interact with the HR Department
E. Provide Feedback

A. View Available Case Information

1. Log in to the LBi HR HelpDesk Employee Access Portal.

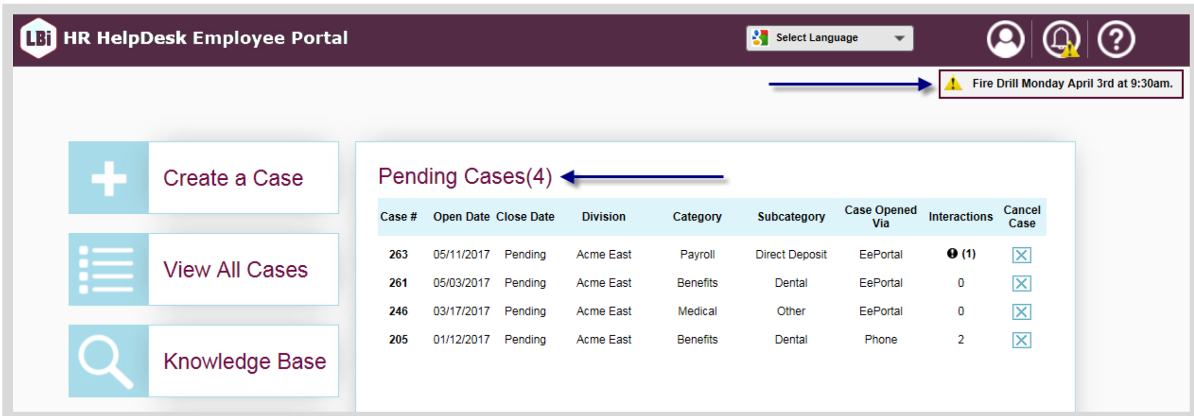
The number of pending cases is displayed, along with any relevant Alerts. All of an employee's cases are displayed in the "History of Past Cases" section.

The information displayed for each case includes the:

- Case number (Case #)
- Date opened (Open Date)
- Date closed or status, if still open (Close Date)
- Division in the system's hierarchy (Division)
  - Category in the system's hierarchy (Category)
  - Subcategory in the system's hierarchy (Subcategory)
  - The method used to open the case; whether it was opened through the self-service portal, by phone, etc. (Case Opened Via)

Any attachments will be indicated by a paper clip icon beside the case number.

2. Place your mouse on a case row to display the "Problem" pop-up window.



3. Click the case row to display a description of the case's problem and resolution.

B. Review Common Problems

1. Select the "Create a Case" tab

2. Select your **Division**, then **categorize** the problem or issue using the options available in the selection lists. If available, a list of "Common Issues that Match your Selection" for the selected category will be displayed.

3. Click a "Common Issue" to display the problem and its resolution.

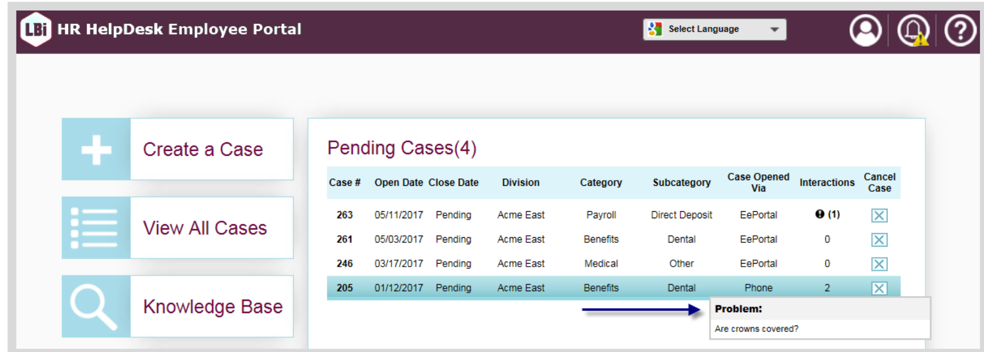
4. Click "Yes" if this was helpful and resolved your issue. A case will not be created.

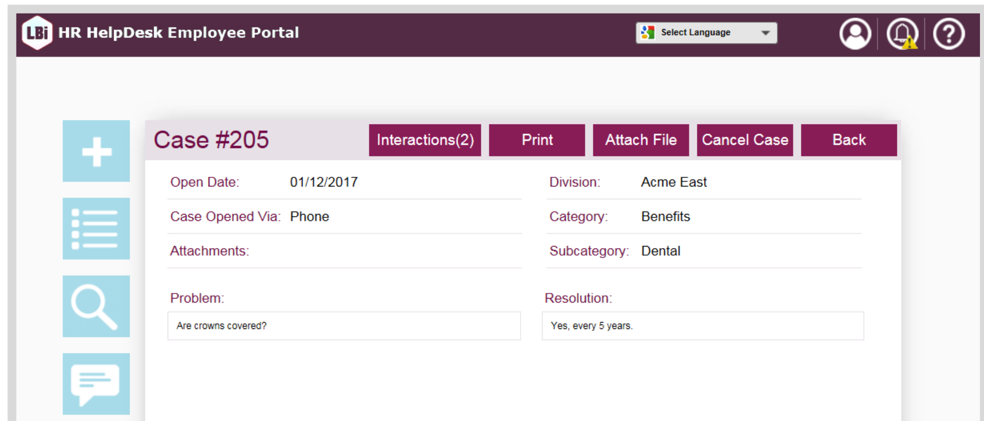
C. Submit a New Case

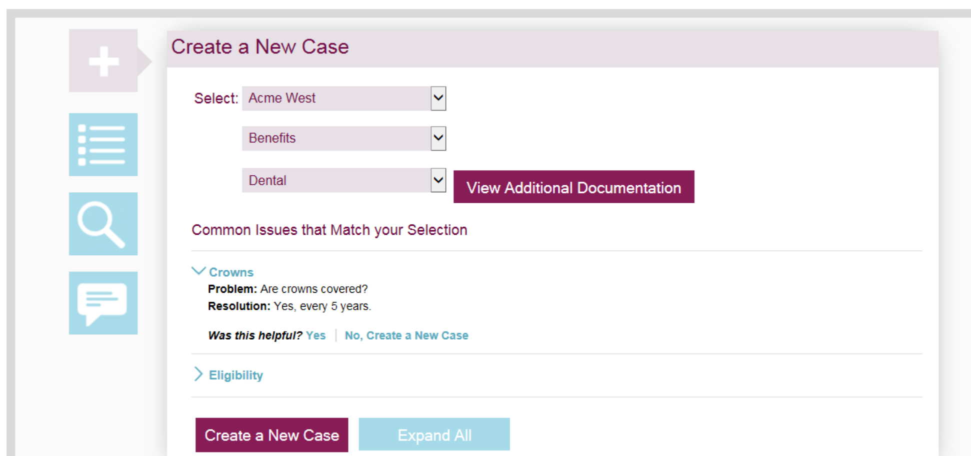
1. Select the "Create a Case" tab

2. If your issue wasn't resolved reviewing the common issues section, select "No, Create a New Case."

The New Case Entry window will be displayed.







3. Enter a description of your problem or issue.

4. Click the “Attach File” button to attach any files.

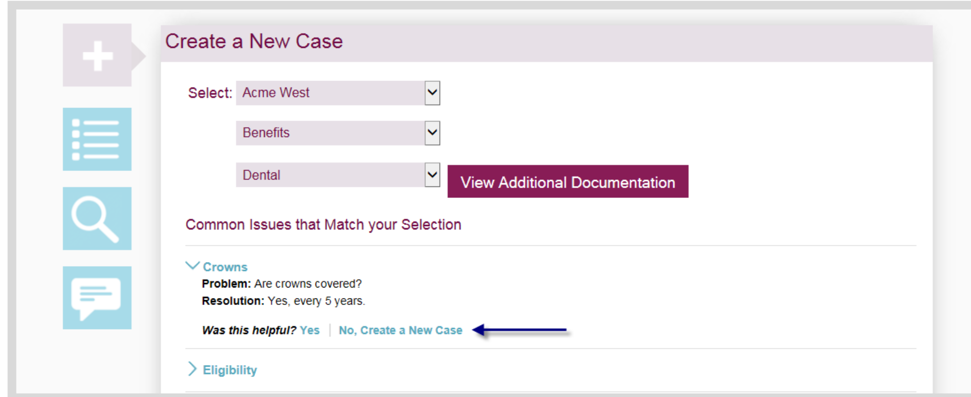
5. Select your preferred method of contact.

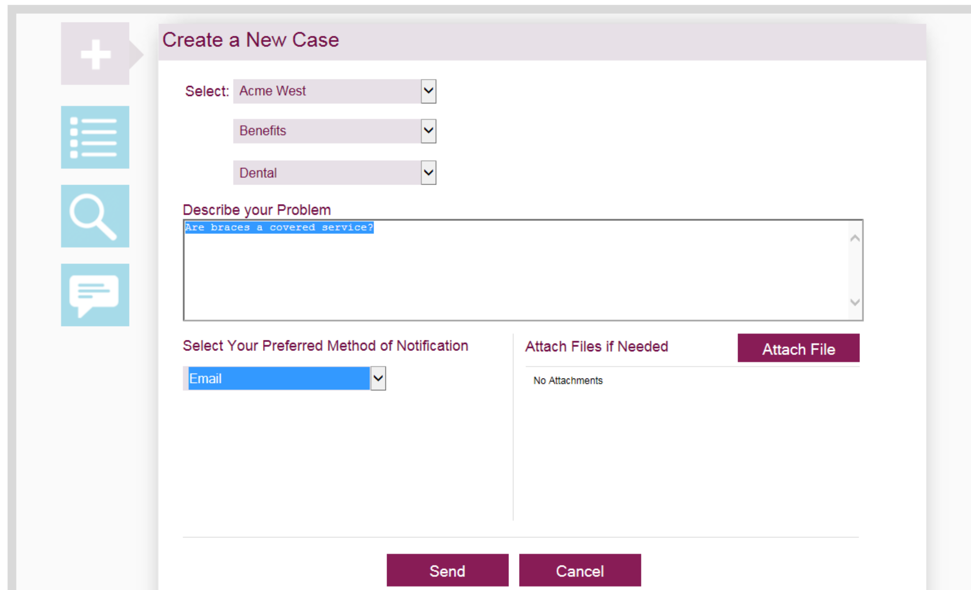
6. Click “Send” to submit your case.

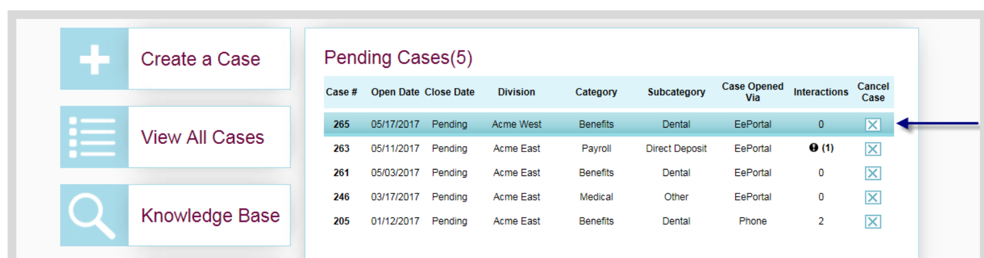
7. *The new case will be displayed at the top of the Case History section.*

8. Click “x” in the Cancel Case column if you no longer want this case reviewed by the HR department.

The case will be closed.







D. Interact with the HR Department

1. Click on a case row to be taken to the case details screen.

2. Click the“Interactions” tab to initiate or review communications between you and the HR department.

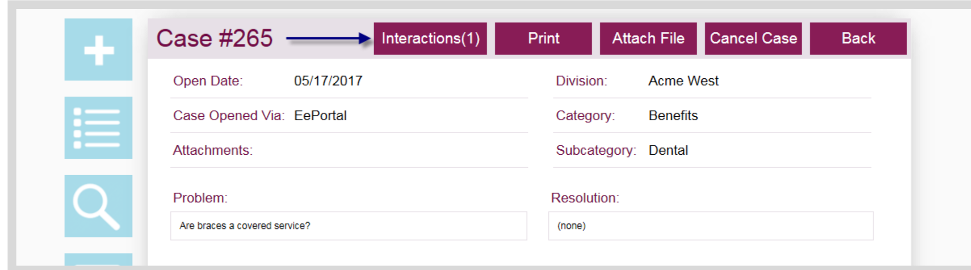
   Unread interactions are indicated with a circled exclamation point, and the total number of interactions will be displayed in bold.

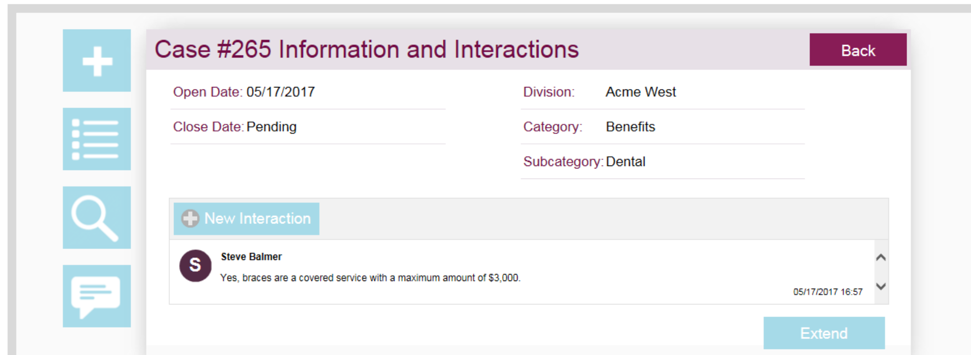
3. Messages sent by the HR department will be displayed.

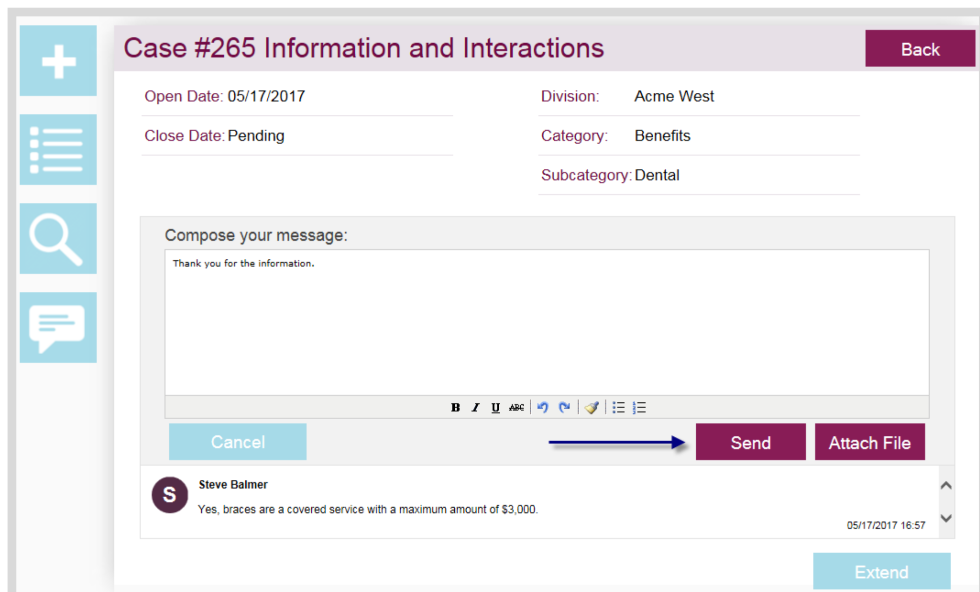
4. Click the “New Interaction” button to enter a new interaction.

5. Enter your message and click “Attach File” to include any documents.

6. Click “Send.”







E. Provide Feedback

1. Click the “Give Feedback” tab (displayed if your company has a survey available for you).

2. Complete the survey questions and click “Submit.”

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.