
LBi HR HelpDesk:

USING THE EMPLOYEE SELF-SERVICE PORTAL

FREE



PRO



PROPLUS



ENTERPRISE

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.

The screenshot shows the LBi HR HelpDesk Employee Portal interface. At the top, there is a header with the LBi logo, the text "HR HelpDesk Employee Portal", a "Select Language" dropdown, and user profile, notification, and help icons. A notification banner at the top right reads "Fire Drill Monday April 3rd at 9:30am.". On the left side, there are three main navigation buttons: "Create a Case" (with a plus icon), "View All Cases" (with a list icon), and "Knowledge Base" (with a magnifying glass icon). The main content area is titled "Pending Cases(4)" and contains a table with the following data:

Case #	Open Date	Close Date	Division	Category	Subcategory	Case Opened Via	Interactions	Cancel Case
263	05/11/2017	Pending	Acme East	Payroll	Direct Deposit	EePortal	1 (1)	<input type="checkbox"/>
261	05/03/2017	Pending	Acme East	Benefits	Dental	EePortal	0	<input type="checkbox"/>
246	03/17/2017	Pending	Acme East	Medical	Other	EePortal	0	<input type="checkbox"/>
205	01/12/2017	Pending	Acme East	Benefits	Dental	Phone	2	<input type="checkbox"/>

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.

HR HelpDesk Employee Portal

Select Language

Create a Case

View All Cases

Knowledge Base

Pending Cases(4)

Case #	Open Date	Close Date	Division	Category	Subcategory	Case Opened Via	Interactions	Cancel Case
263	05/11/2017	Pending	Acme East	Payroll	Direct Deposit	EePortal	1	[X]
261	05/03/2017	Pending	Acme East	Benefits	Dental	EePortal	0	[X]
246	03/17/2017	Pending	Acme East	Medical	Other	EePortal	0	[X]
205	01/12/2017	Pending	Acme East	Benefits	Dental	Phone	2	[X]

Problem:
Are crowns covered?

HR HelpDesk Employee Portal

Select Language

Case #205

Interactions(2) Print Attach File Cancel Case Back

Open Date: 01/12/2017 Division: Acme East

Case Opened Via: Phone Category: Benefits

Attachments: Subcategory: Dental

Problem: Resolution: Yes, every 5 years.

Are crowns covered?

HR HelpDesk Employee Portal

Select Language

Create a New Case

Select: Acme West

Benefits

Dental

View Additional Documentation

Common Issues that Match your Selection

▼ Crowns
Problem: Are crowns covered?
Resolution: Yes, every 5 years.

Was this helpful? Yes | No, Create a New Case

► Eligibility

Create a New Case Expand All

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.

Create a New Case

Select: Acme West

Benefits

Dental [View Additional Documentation](#)

Common Issues that Match your Selection

✓ Crowns
 Problem: Are crowns covered?
 Resolution: Yes, every 5 years.
 Was this helpful? Yes | [No, Create a New Case](#)

> Eligibility

Create a New Case

Select: Acme West

Benefits

Dental

Describe your Problem

Are braces a covered service?

Select Your Preferred Method of Notification

Email

Attach Files if Needed

Attach File

No Attachments

Send Cancel

Pending Cases(5)

Case #	Open Date	Close Date	Division	Category	Subcategory	Case Opened Via	Interactions	Cancel Case
265	05/17/2017	Pending	Acme West	Benefits	Dental	EePortal	0	✕
263	05/11/2017	Pending	Acme East	Payroll	Direct Deposit	EePortal	● (1)	✕
261	05/03/2017	Pending	Acme East	Benefits	Dental	EePortal	0	✕
246	03/17/2017	Pending	Acme East	Medical	Other	EePortal	0	✕
205	01/12/2017	Pending	Acme East	Benefits	Dental	Phone	2	✕

D. Interact with the HR Department

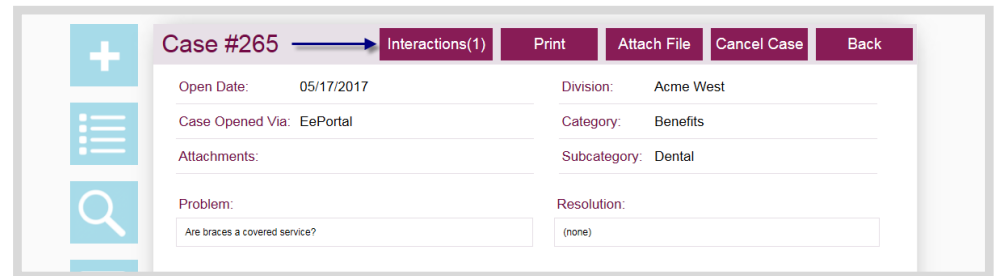
1. Click on a case row to be taken to the case details screen.
2. Click the “Interactions” tab to initiate or review communications between you and the HR department.

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

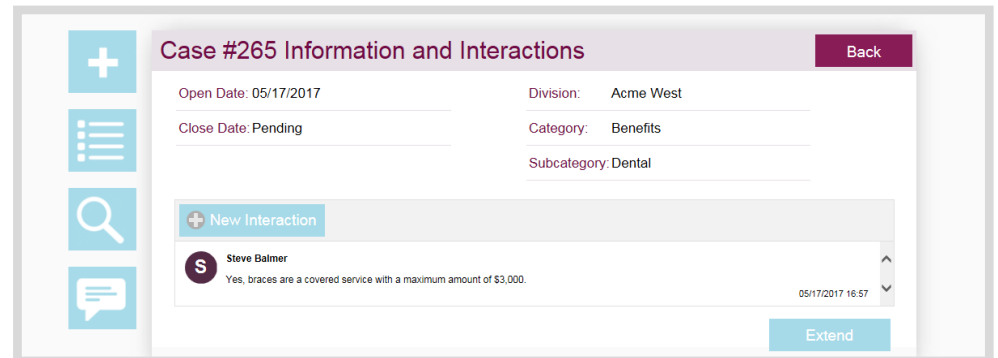
3. Messages sent by the HR department will be displayed.
4. Click the “New Interaction” button to enter a new interaction.
5. Enter your message and click “Attach File” to include any documents.
6. Click “Send.”

E. Provide Feedback

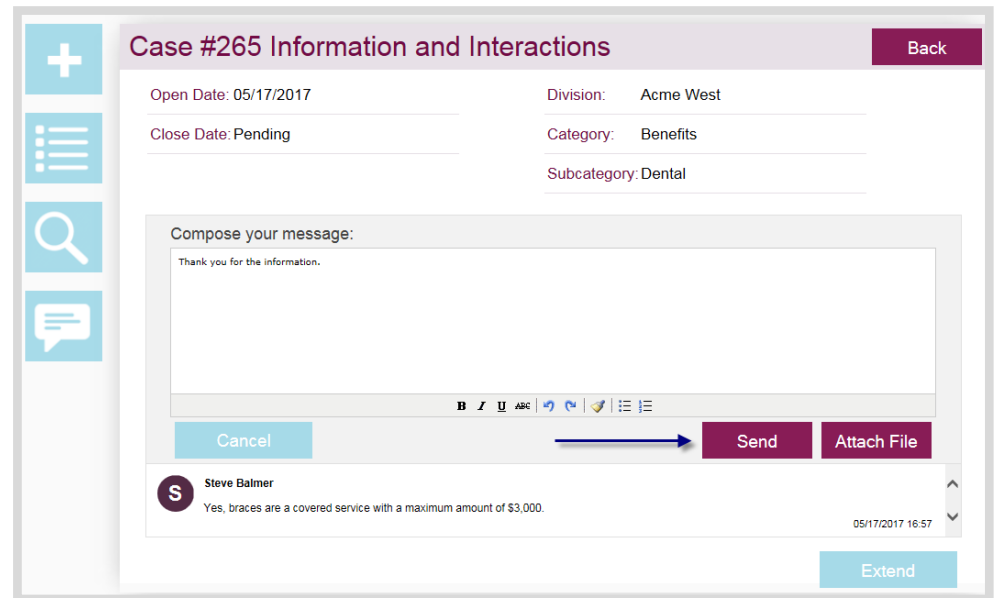
1. Click the “Give Feedback” tab (displayed if your company has a survey available for you).
2. Complete the survey questions and click “Submit.”



This screenshot shows the 'Case #265' details screen. At the top, there are navigation tabs: '+', 'Interactions(1)', 'Print', 'Attach File', 'Cancel Case', and 'Back'. The main content area is divided into several sections: 'Open Date: 05/17/2017', 'Division: Acme West', 'Case Opened Via: EePortal', 'Category: Benefits', 'Attachments:', 'Subcategory: Dental', 'Problem: Are braces a covered service?', and 'Resolution: (none)'. A sidebar on the left contains icons for home, list, search, and messages.



This screenshot shows the 'Case #265 Information and Interactions' screen. It features a 'Back' button in the top right corner. The main content area displays case details: 'Open Date: 05/17/2017', 'Division: Acme West', 'Close Date: Pending', 'Category: Benefits', and 'Subcategory: Dental'. Below this is a 'New Interaction' button and a list of interactions. The first interaction is from 'Steve Balmer' with the message 'Yes, braces are a covered service with a maximum amount of \$3,000.' and a timestamp of '05/17/2017 16:57'. An 'Extend' button is located at the bottom right.



This screenshot shows the 'Case #265 Information and Interactions' screen with a message composition window open. The window has a 'Compose your message:' header and a text area containing 'Thank you for the information.'. Below the text area is a rich text editor toolbar with options for bold, italic, underline, and other formatting. At the bottom of the window are 'Cancel', 'Send', and 'Attach File' buttons. The background shows the same case details as the previous screenshot, with the 'Interactions' list partially visible.

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.

