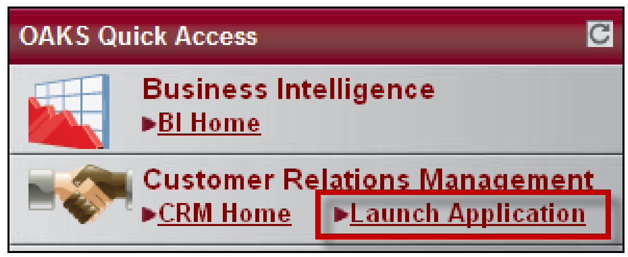
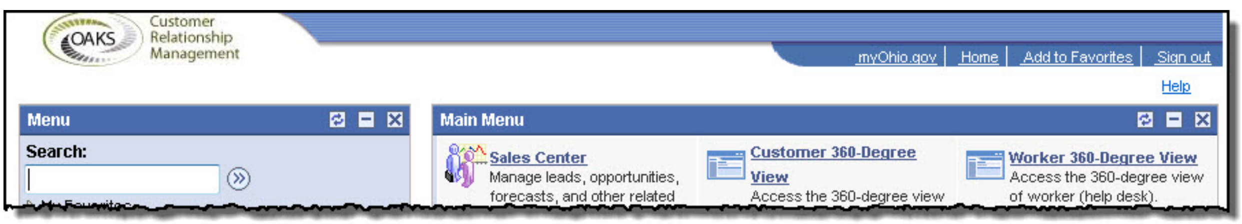
CREATING A CASE FOR A WORKER

This job aid will serve as a guide to creating a case for a worker in PeopleSoft CRM 9.0.

Note Before beginning the steps below, navigate to https://myohio.oaks.ohio.gov and log in with OAKS User ID and password.

Step-by-Step	Screen
1. Click **Launch Application** link in the **Customer Relations Management** row in the **OAKS Quick Access** section	

The OAKS Customer Relationship Management (CRM) screen will display.



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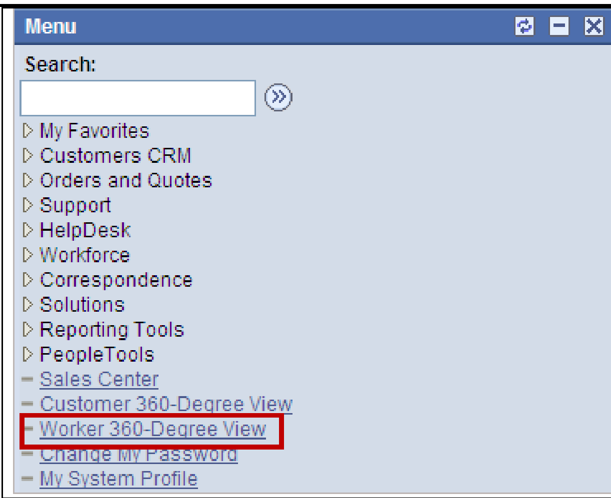
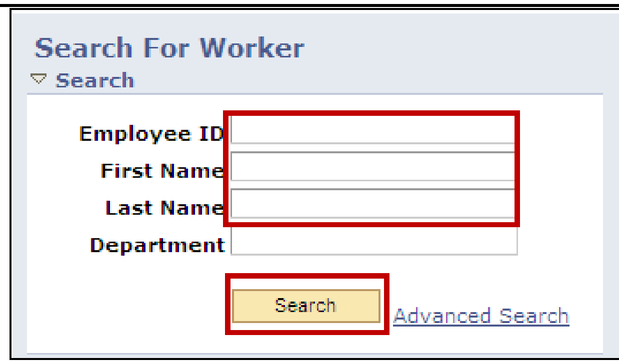
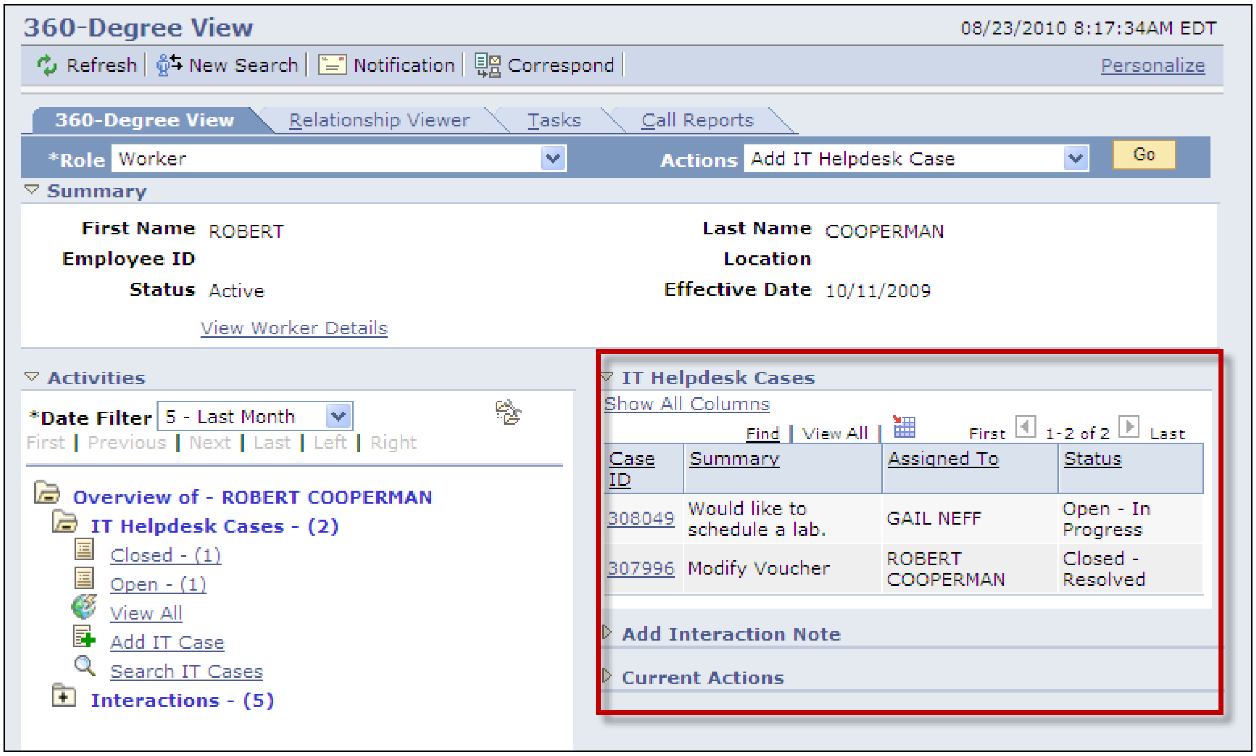
Step-by-Step for Creating A Case for a Worker.

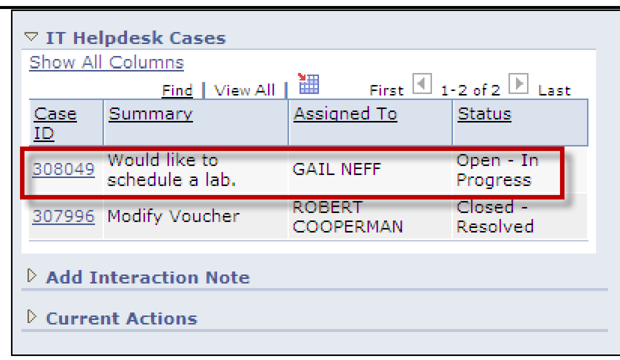
<table>
<tr><th>Step-by-Step</th><th>Screen</th></tr>
<tr><td>2. Click on the Worker 360-Degree View link.</td><td>
</td></tr>
<tr><td>3. Enter search criteria in the Employee ID, First Name <u>and/or</u> Last Name boxes.

4. Click Search.</td><td>
</td></tr>
</table>

The **360 Degree View** page is displayed.

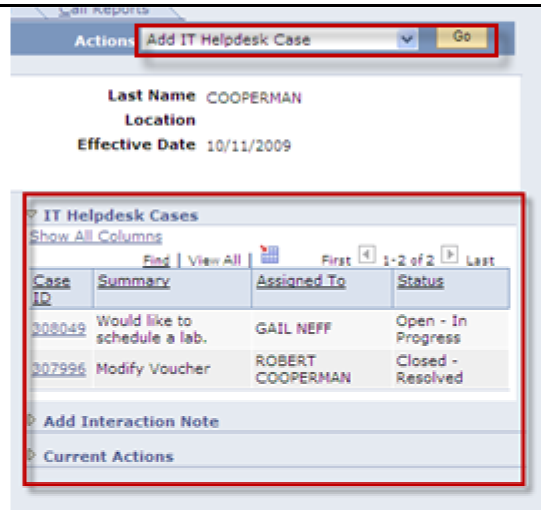


5. Review the existing cases to ensure there is not already a case open for the issue. If there is click on the applicable case number in the **Case ID** field. If not skip to step 6.

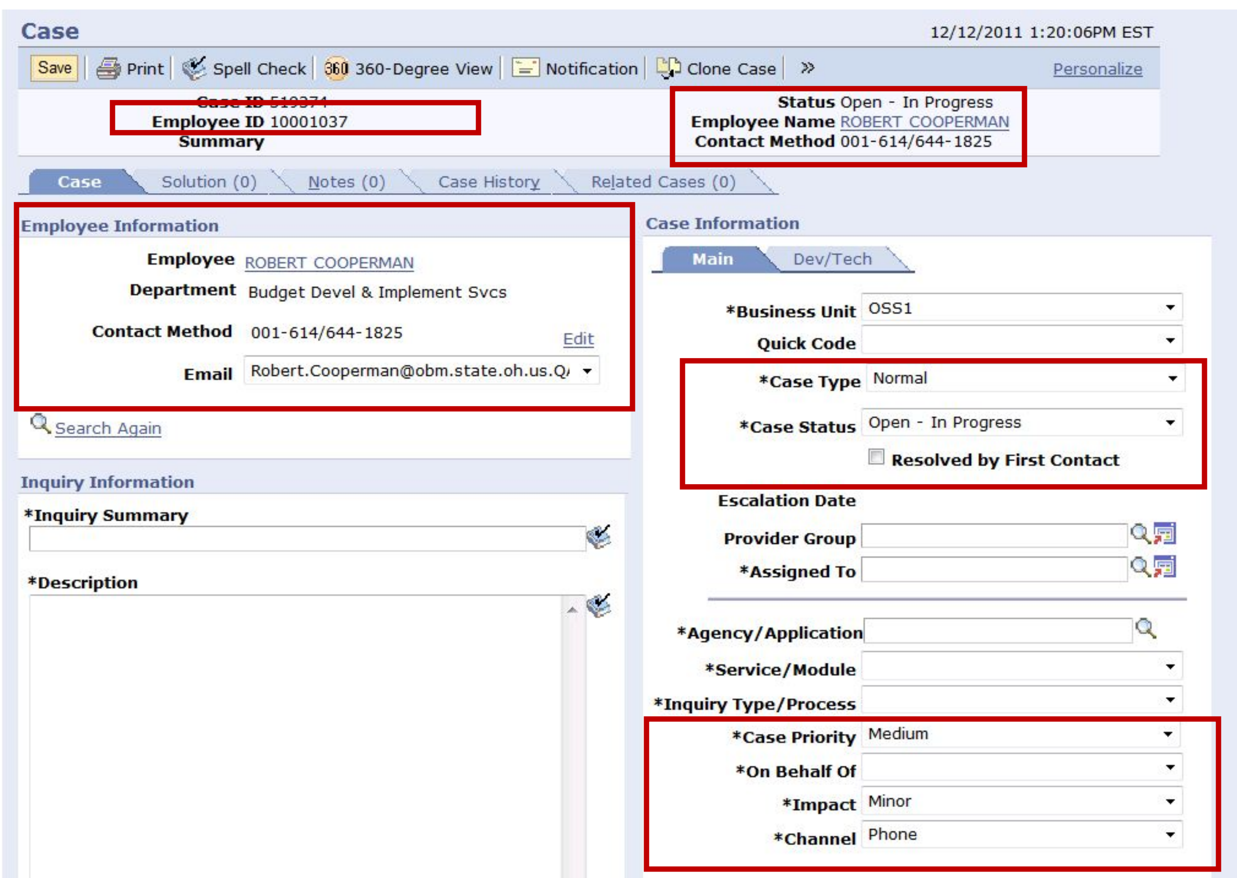


6. Click **Go** for **Add IT Helpdesk Case** in the **Actions** field.

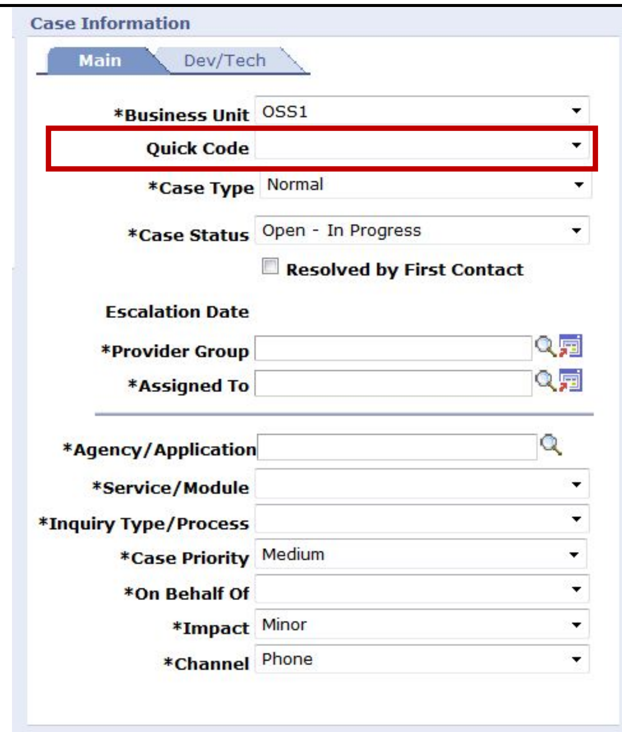
Note The **360-Degree View** page will show any previous **IT HelpDesk Cases** for the worker.



The **Case** page displays auto-filled with some of the employee and case information.

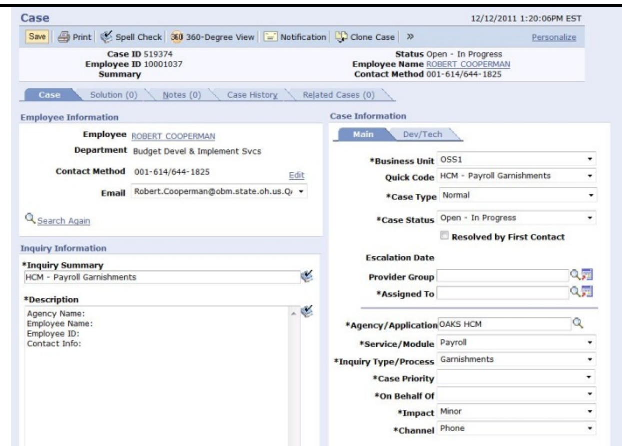


7. If applicable use the drop-down arrow to the right of the **Quick Code** field to choose a department/problem that best identifies the case.



Choosing a **Quick Code** auto-fills various fields.

8. Manually add information to the remaining required (*) fields.



9. Manually add information to the **Inquiry Summary** and **Description** fields. Add as much information as possible to give a clear idea of the case. Any required fields that were "missed" will be highlighted. The required fields must be filled in before the case can be saved.

10. Click **Save Case**.