

ESCALATING A WORKER'S CASE

Purpose

This job aid will serve as a guide to escalating a worker's case in PeopleSoft CRM 9.0.



Cases are to be escalated when considered a critical priority. Your business unit will determine those parameters.

Logging into CRM



Before beginning any steps below, navigate to <https://myohio.oaks.ohio.gov> and log in with your OAKS User ID and password.

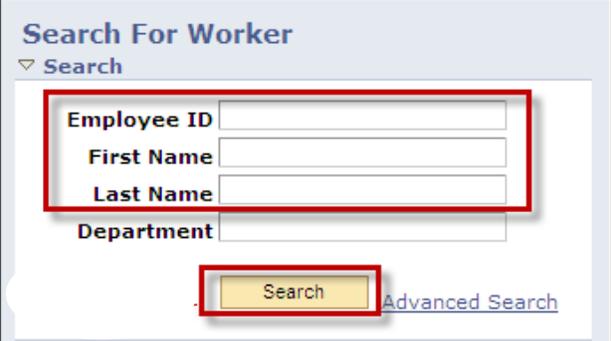
Step-by-Step	Screen
1. Click Launch Application link in the Customer Relationship Mgmt. row in the OAKS Quick Access section	

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



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Step-by-Step for Escalating a Worker's Case

Step-by-Step	Screen
2. Click on Worker 360-Degree View .	 <p>The screenshot shows a 'Menu' window with a search bar at the top. Below the search bar is a list of menu items: My Favorites, Customers CRM, Orders and Quotes, Support, HelpDesk, Workforce, Correspondence, Solutions, Reporting Tools, PeopleTools, Sales Center, Customer 360-Degree View, Worker 360-Degree View, Change My Password, and My System Profile. The 'Worker 360-Degree View' item is highlighted with a red rectangular box.</p>
3. Enter search criteria in the Employee ID, First Name and/or Last Name boxes. 4. Click Search .	 <p>The screenshot shows the 'Search For Worker' form. It has a 'Search' dropdown menu. Below it are four input fields: 'Employee ID', 'First Name', 'Last Name', and 'Department'. The 'Employee ID', 'First Name', and 'Last Name' fields are grouped together and highlighted with a red rectangular box. Below the input fields is a 'Search' button, which is also highlighted with a red rectangular box. To the right of the 'Search' button is a link for 'Advanced Search'.</p>

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

360-Degree View 11/30/2011 1:18:13PM EST

Refresh New Search Notification Correspond Personalize

360-Degree View Relationship Viewer Tasks Call Reports

*Role Worker Actions Add IT Helpdesk Case Go

Summary

First Name ROBERT Last Name COOPERMAN
 Employee ID 10001037 Location
 Status Active Effective Date 02/27/2011
[View Worker Details](#)

Activities

*Date Filter 5 - Last Month
 First | Previous | Next | Last | Left | Right

Overview of - ROBERT COOPERMAN

- IT Helpdesk Cases - (2)
 - Closed - (1)
 - Open - (1)
 - View All
 - Add IT Case
 - Search IT Cases
 - Interactions - (9)

IT Helpdesk Cases

Show All Columns Find | View All | First 1-2 of 2 Last

Case ID	Summary	Assigned To	Status
513063	I've attached a course request form for a WBT (Domestic Violence Awareness for M	DAVID PEEBLES	Closed - Resolved
513054	ELM Catalog Course Request	Katherine Vanhooose	Open - In Progress

Add Interaction Note
Current Actions

5. Click on the open case number that needs to be escalated under **Case ID**.

IT Helpdesk Cases

Show All Columns Find | View All | First 1-2 of 2 Last

Case ID	Summary	Assigned To	Status
513063	I've attached a course request form for a WBT (Domestic Violence Awareness for M	DAVID PEEBLES	Closed - Resolved
513054	ELM Catalog Course Request	Katherine Vanhooose	Open - In Progress

Add Interaction Note
Current Actions

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The **Case** page is displayed.

Case History Select One... 11/30/2011 1:20:14PM EST

Save Print Spell Check 360 360-Degree View Notification Clone Case Personalize

Case ID 513054 **Status** Open - In Progress
Employee ID 10001037 **Employee Name** ROBERT COOPERMAN
Summary ELM Catalog Course Request **Contact Method** 001-614/644-1825

Case Solution (1) Notes (1) History Related Cases (0)

Employee Information

Employee ROBERT COOPERMAN
Department Budget Devel & Implement Svcs
Contact Method 001-614/644-1825 [Edit](#)
Email Robert.Cooperman@obm.state.oh.us.Q

[Search Again](#)

Case Information

Main Dev/Tech

***Business Unit** OSS1
Quick Code
***Case Type** Normal
***Case Status** Open - In Progress
 Resolved by First Contact

Escalation Date

Provider Group HCM - ELM
***Assigned To** Katherine Vanhooose

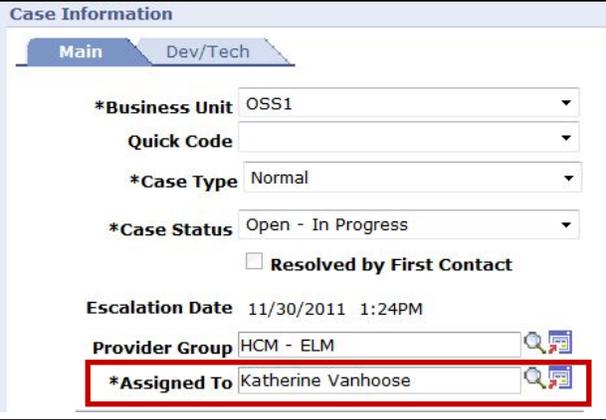
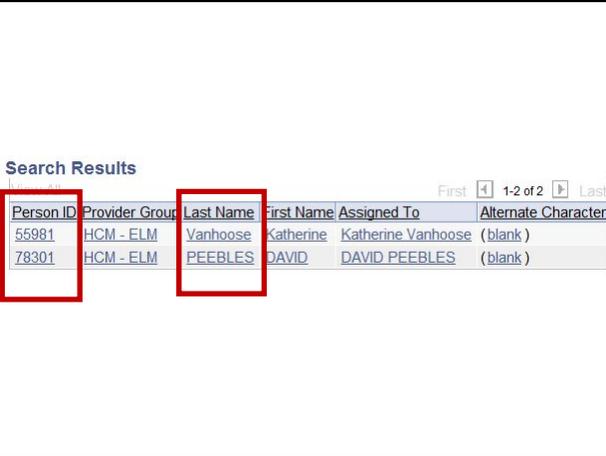
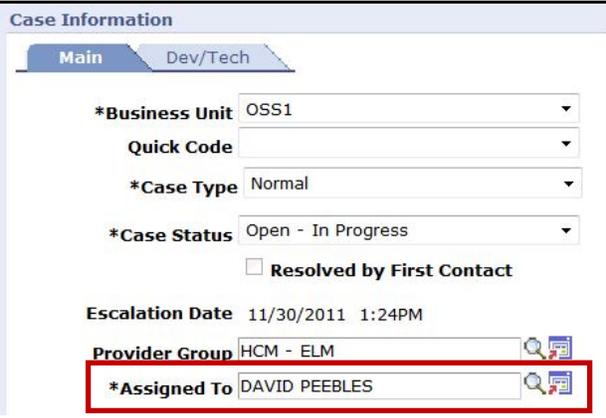
***Agency/Application** OBM
***Service/Module** ELM
***Inquiry Type/Process** Other
***Case Priority** Medium
***On Behalf Of** Agency
***Impact** Minor
***Channel** Phone

Inquiry Information

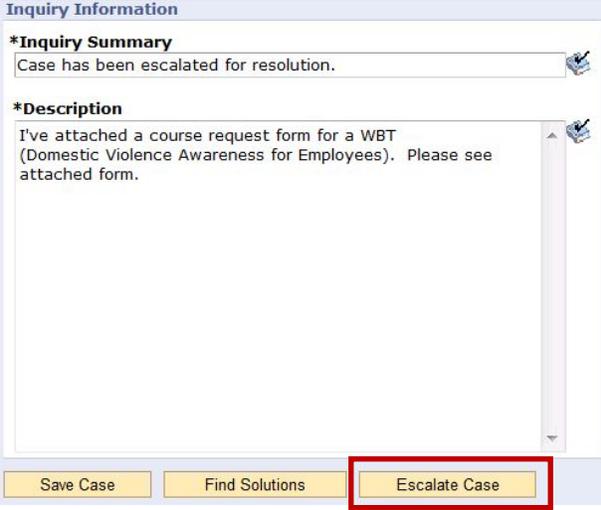
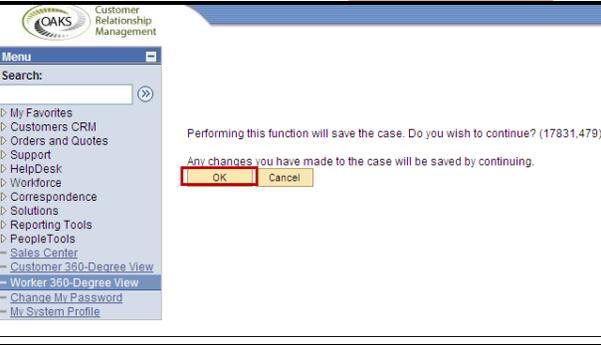
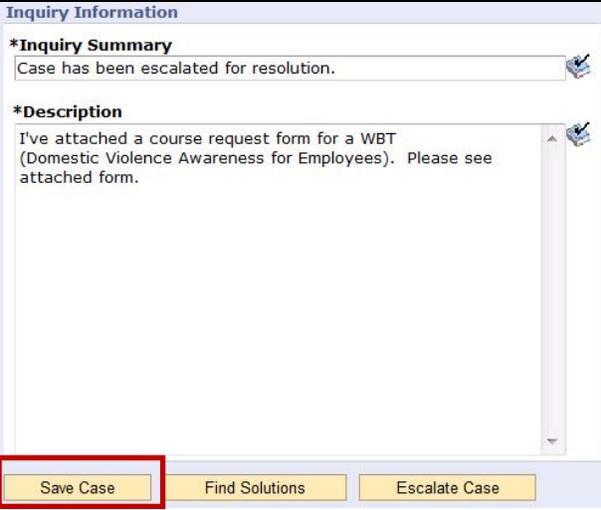
***Inquiry Summary**
ELM Catalog Course Request

***Description**
I've attached a course request form for a WBT (Domestic Violence Awareness for Employees). Please see attached form.

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Step-by-Step	Screen																		
<p>6. Modify any field(s) on the case page with updated information including the *Assigned To field. Click the Search icon to search for a new assignee for the *Assigned To box.</p> <p> This is a required step.</p>	 <p>The screenshot shows the 'Case Information' form with tabs for 'Main' and 'Dev/Tech'. Fields include Business Unit (OSS1), Quick Code, Case Type (Normal), Case Status (Open - In Progress), Escalation Date (11/30/2011 1:24PM), Provider Group (HCM - ELM), and *Assigned To (Katherine Vanhooose). The *Assigned To field is highlighted with a red box.</p>																		
<p>7. Click on one of the links such as Person ID, or Last Name to determine the assignee.</p>	 <p>The screenshot shows 'Search Results' with a table of results. The 'Person ID' and 'Last Name' columns are highlighted with red boxes. The table contains two rows of data.</p> <table border="1"> <thead> <tr> <th>Person ID</th> <th>Provider Group</th> <th>Last Name</th> <th>First Name</th> <th>Assigned To</th> <th>Alternate Character</th> </tr> </thead> <tbody> <tr> <td>55981</td> <td>HCM - ELM</td> <td>Vanhooose</td> <td>Katherine</td> <td>Katherine Vanhooose</td> <td>(blank)</td> </tr> <tr> <td>78301</td> <td>HCM - ELM</td> <td>PEEBLES</td> <td>DAVID</td> <td>DAVID PEEBLES</td> <td>(blank)</td> </tr> </tbody> </table>	Person ID	Provider Group	Last Name	First Name	Assigned To	Alternate Character	55981	HCM - ELM	Vanhooose	Katherine	Katherine Vanhooose	(blank)	78301	HCM - ELM	PEEBLES	DAVID	DAVID PEEBLES	(blank)
Person ID	Provider Group	Last Name	First Name	Assigned To	Alternate Character														
55981	HCM - ELM	Vanhooose	Katherine	Katherine Vanhooose	(blank)														
78301	HCM - ELM	PEEBLES	DAVID	DAVID PEEBLES	(blank)														
<p>The *Assigned To box has been filled with the new assignee.</p>	 <p>The screenshot shows the 'Case Information' form, identical to the first screenshot, but with the *Assigned To field now containing 'DAVID PEEBLES' and highlighted with a red box.</p>																		

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<p>8. Click on Escalate Case.</p>	 <p>Inquiry Information</p> <p>*Inquiry Summary Case has been escalated for resolution.</p> <p>*Description I've attached a course request form for a WBT (Domestic Violence Awareness for Employees). Please see attached form.</p> <p>Save Case Find Solutions Escalate Case</p>
<p>A question that essentially asks if you really want to escalate the case is displayed.</p> <p>9. Click OK.</p>	 <p>OAKS Customer Relationship Management</p> <p>Menu</p> <p>Search:</p> <ul style="list-style-type: none">My FavoritesCustomers CRMOrders and QuotesSupportHelpDeskWorkforceCorrespondenceSolutionsReporting ToolsPeopleToolsSales CenterCustomer 360-Degree ViewWorker 360-Degree ViewChange My PasswordMy System Profile <p>Performing this function will save the case. Do you wish to continue? (17831.479)</p> <p>Any changes you have made to the case will be saved by continuing.</p> <p>OK Cancel</p>
<p>10. Click on Save Case.</p>	 <p>Inquiry Information</p> <p>*Inquiry Summary Case has been escalated for resolution.</p> <p>*Description I've attached a course request form for a WBT (Domestic Violence Awareness for Employees). Please see attached form.</p> <p>Save Case Find Solutions Escalate Case</p>

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The following will occur:

The **Case Status** will show “Open – Escalated”. There is also an **Escalation Date** stamp.

The **Inquiry Summary** field changes to “Case has been escalated for reosolution.”

The Case Priority will show “Critical”

The screenshot shows a web interface for case management. On the left, under 'Inquiry Information', the '*Inquiry Summary' field contains the text 'Case has been escalated for resolution.' and the '*Description' field contains 'kk'. On the right, a list of fields is shown: '*Case Status' is 'Open - Escalated', 'Escalation Date' is '05/02/2013 3:10PM', '*Provider Group' is 'OSS - Contact Center', '*Assigned To' is 'Kurt Szabo', '*Agency/Application' is 'DVS', '*Service/Module' is 'Customer Service', '*Inquiry Type/Process' is 'General Info', '*Case Priority' is 'Critical', '*On Behalf Of' is 'Individual', and '*Impact' is 'Minor'. Red boxes highlight the 'Inquiry Summary' field and the 'Case Status' and 'Case Priority' dropdowns.

11. Click on the Notes tab enter information into the **Subject** field.

The screenshot shows the 'Note Details' form. The 'Added' field shows '11/30/2011 1:31PM' and 'Training ID'. The '*Subject' field contains 'Case has been escalated for resolution.'. Below this is a 'Details' field which is currently empty. Under 'Note Information', '*Visibility' is 'Internal', 'Note Type' is empty, and 'Origin' is empty. At the bottom, there are buttons for 'Apply Note', 'Add an Attachment', 'Save Case', 'Find Solutions', and 'Escalate Case'. A red box highlights the 'Subject' field.

12. In the **Details** field, type an explanation of why the case needed escalating.

This screenshot is similar to the previous one, but the 'Details' field now contains the text '.....determined escalation of this case.'. A red box highlights this field.

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<p>13. Add an Attachment if necessary and then click Apply Note.</p>	
<p>The notes you wrote in Details now shows under Subject and Details.</p>	
<p>14. Click Save Case. An automatic notification is sent to the Assigned To person indicating there is a escalated case that needs their attention</p>	