

NAVIGATING TO THE CASE PAGE WITH ONLY A WORKER'S CASE NUMBER

Purpose

This job aid will serve as a guide on how to quickly navigate to the Case Page when only the case number is known.



Many of the job aids will be simpler to follow if a case number is known.

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 Relationship Management (CRM) screen will display.



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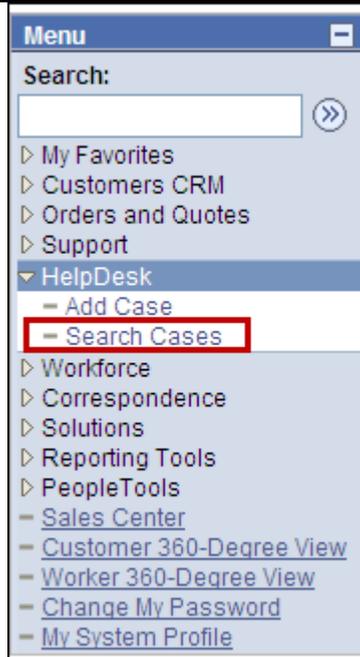
Searching Cases with a Worker's Case Number

The screenshot shows the OAKS Customer Relationship Management interface. At the top, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out' links. A 'Menu' window is open on the left side, featuring a search field and a list of navigation options. The 'Main Menu' area contains several tool tiles, each with an icon and a brief description of its function. The 'HelpDesk' tile is highlighted with a red box in the original image.

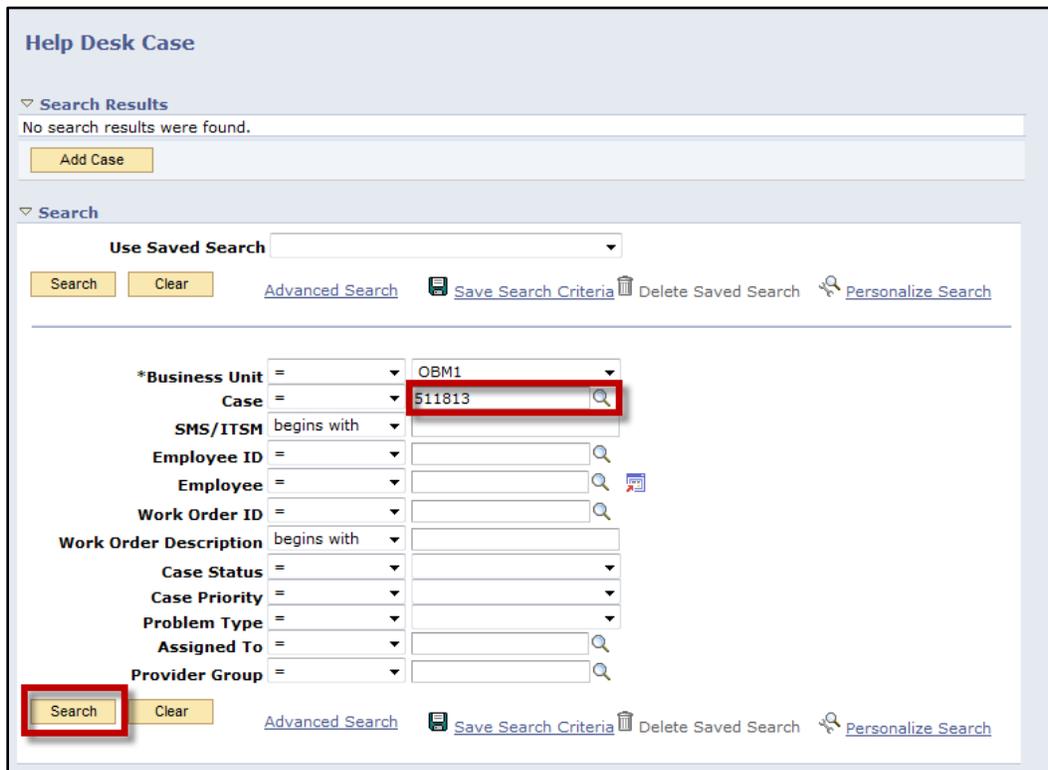
Step-by-Step	Screen
<p>1. Click on the HelpDesk link.</p>	<p>The screenshot shows the 'Menu' window from the previous image. The 'HelpDesk' link is highlighted with a red box, indicating the step in the process.</p>

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2. Click on the **Search Cases** link.



The **Help Desk Case** page displays.



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3. Enter the case number in the **Case** box.
4. Click the **Search** button.

*Business Unit = Ohio
Case = 308032
SMS/ITSM begins with
Employee ID =
Employee =
Work Order ID =
Work Order Description begins with
Case Status =
Case Priority =
Problem Type =
Assigned To =
Provider Group =

Search Clear Advanced Search Save Search Criteria Del

The **Case** page is displayed.

Case 11/22/2011 9:54:38AM EST

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

Case ID 511813 Status Open - In Progress
Employee ID 10085691 Employee Name CATHERINE FENDERSON
Summary Denied Expense Reports Deleted and Recre... Contact Method 877/644-6771

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

Employee Information

Employee CATHERINE FENDERSON
Department Governmental Services
Contact Method 877/644-6771 Edit
Email Catherine.Fenderson@obm.state.oh

Search Again

Inquiry Information

*Inquiry Summary
Denied Expense Reports Deleted and Recreated

*Description
Currently travelers have the ability to delete and recreate expense reports that have been DENIED by OSS.
When an expense report is deleted, it reopens the Travel Authorization used to create it. This travel authorization has already been approved by the traveler's supervisor and will not require re-approval. Expense Reports that are denied by OSS or the traveler's supervisor usually represents travel that isn't approvable/reimbursable and should not be recreated.
This issue presents a potentially negative impact on the traveler's agency as it will allow travelers to seek reimbursement for non-qualifying expenses even after the authoritative agency (OBM/OSS) has deemed them non reimbursable. (i.e. personal auto mileage over 90 days)

Save Case Find Solutions Escalate Case

Case Information

Main Dev/Tech

*Business Unit OBM1
Quick Code
*Case Type Defect
*Case Status Open - In Progress
 Resolved by First Contact
Escalation Date
Provider Group RACM - Travel & Expense
*Assigned To PATRICK SELLAN
*Agency/Application OBM
*Service/Module Travel and Expense
*Inquiry Type/Process T&E Technical
*Case Priority Medium
*On Behalf Of Agency
*Impact Significant
*Channel Phone