Local HR – CMS User Guide

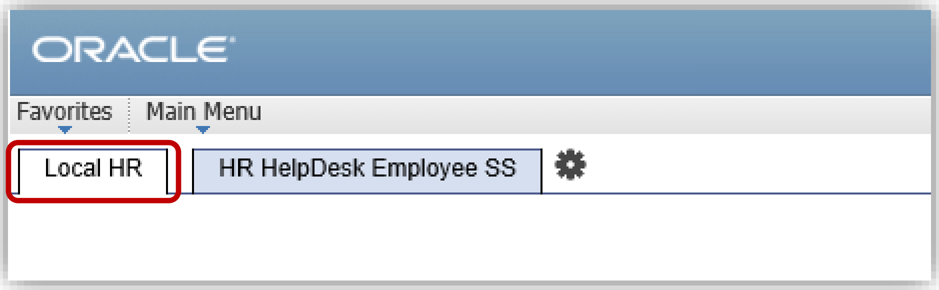
Case Management System

User Guide for Local HR Staff

Introduction

The Case Management System (CMS) allows Local HR staff to create cases for or on behalf of staff. This is a short guide to assist HR staff in creating Local HR cases, accessing pre-existing Local HR cases, and transferring Local HR cases.

For all aspects of Case Management as a Local HR user, you should use the Local HR tab on the CMS homepage. The HR Helpdesk tab is for your personal cases, and any cases raised there will remain on your own CMS record.



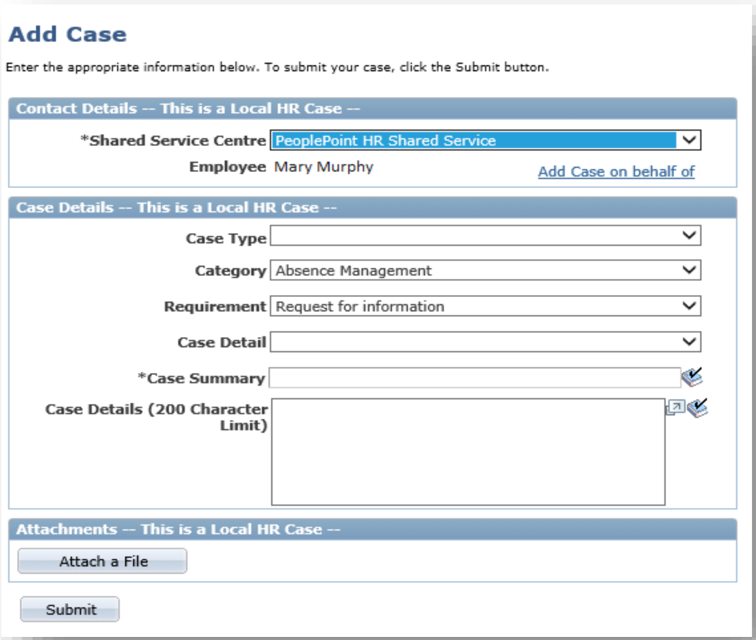
Most Local HR cases are raised On Behalf Of, and refer to a single employee. These cases have three options for visibility and communications, detailed in Examples 1 to 3. For cases dealing with multiple employees, or for general queries, please follow the guidelines in Example 4: Mass Case.

Example 1: On Behalf Of, with notifications to Employee

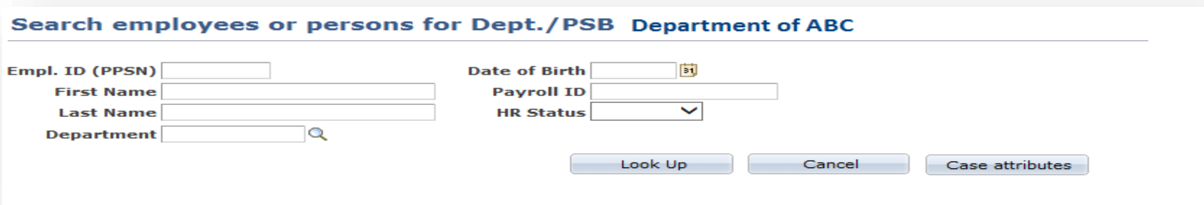
Local HR Officer Mary Murphy is creating a Local HR Case on behalf of John Smith, who is an active employee in the same department. Mary wants John to receive the automatic emails for this case.

Mary logs in to CMS, clicks the Local HR tab, and selects Local HR - Add Case.

This brings Mary to the 'Add Case' screen:



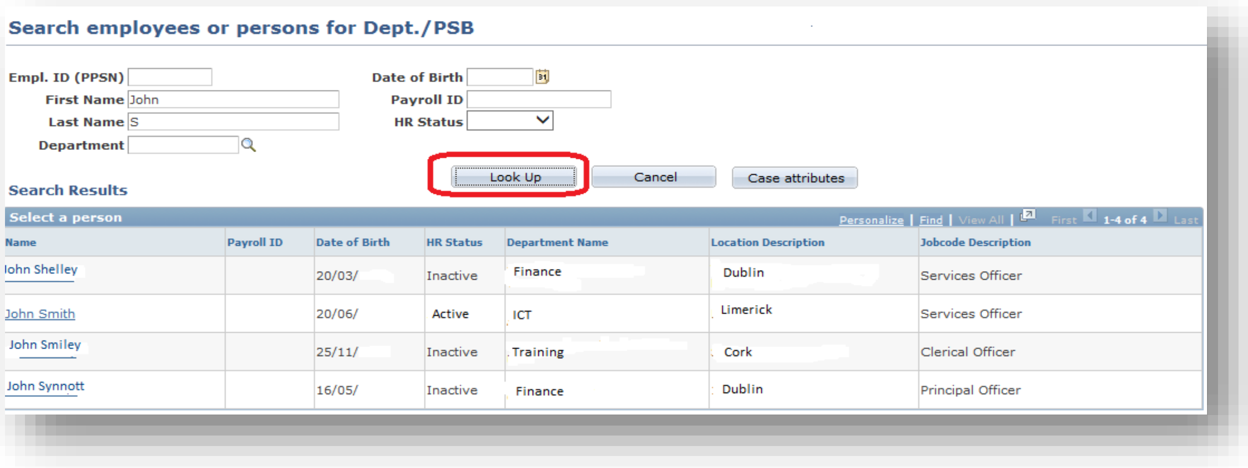
On the 'Add Case' screen there is an option to Add Case on behalf of. After selecting this, Mary will see a search page to find people in her organisation. For reference, the PSB code and department description is listed at the top of the screen:



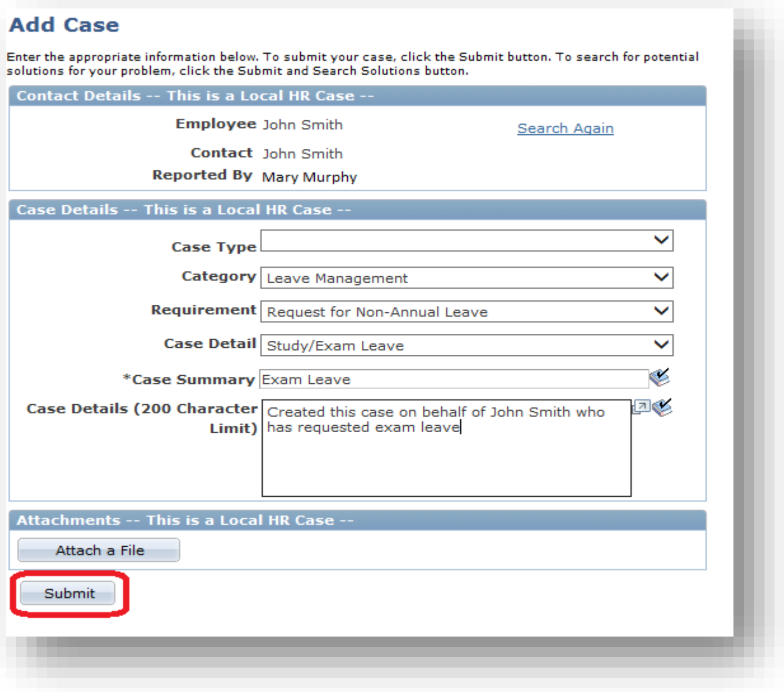
The following fields are available to Mary to search for employees:

Employee ID (PPS Number)	First Name	Date of Birth	Department ID
HR Status (Active / Inactive)	Last Name	Payroll ID	

Mary does not have John Smith's PPS number to hand, so she enters partial values for First Name and Last Name, and presses the **"Look Up"** button to start the search. The results appear below the search criteria.



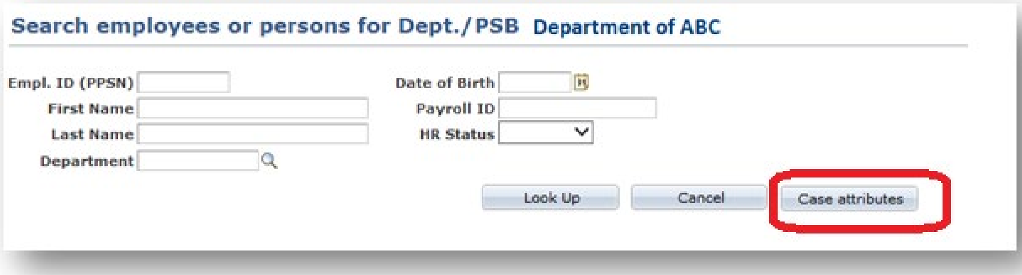
Mary chooses John Smith by clicking the hyperlink in his name. This brings Mary back to the **Add Case** page, where John Smith is recorded as the case Contact.



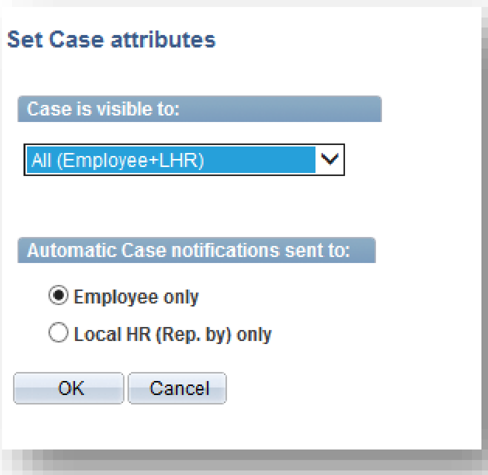
When Mary presses 'submit', a confirmation page appears containing the Case ID. Mary presses the 'OK' button to continue, and John Smith receives an automatic notification by email confirming that a case has been created for him.

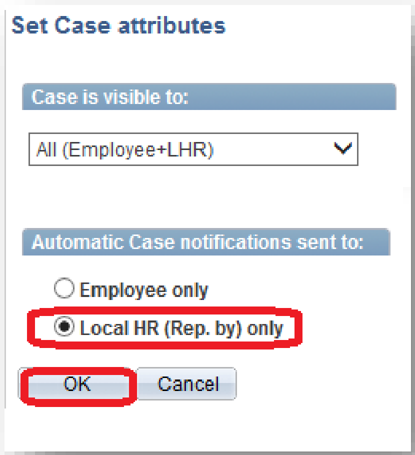
Example 2: On Behalf Of, with notifications to Local HR

Mary follows the same steps to ‘add case on behalf of’, which brings up the below screen. Before searching for an employee she presses the case attributes button.



Mary changes the case attributes setting to allow for automatic notification emails to be sent to Local HR only. This time when John Smith is selected, the ‘Add Case’ screen will show Mary Murphy as the contact rather than John Smith.



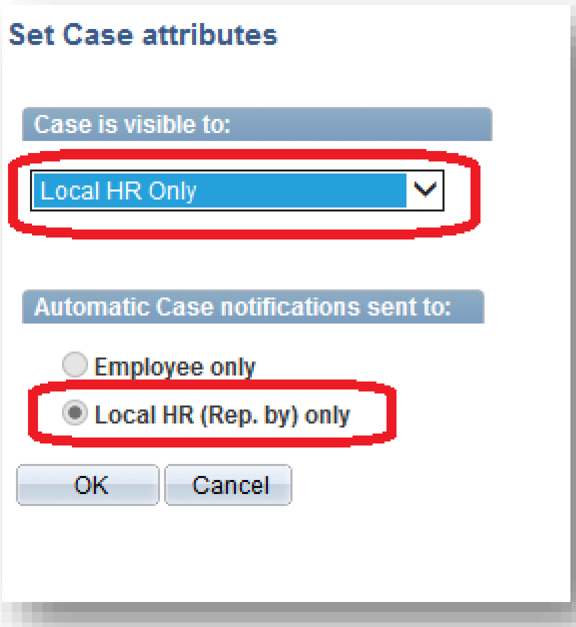


Remember that the person recorded as the Contact will receive all automatically generated e-mails about this case. In this situation **Mary Murphy** will receive the auto-generated emails.

Example 3: On Behalf Of, hidden from Employee

In this example Mary wants to raise a case for John Smith but wants the case hidden from his self-service view. Mary, who reported this case, is to receive all automatic email notifications about this case. As above, Mary clicks the case attributes button.

Here she selects ‘Local HR Only’ for case visibility, and this automatically sets case notifications to ‘Local HR (Rep. by) only’.



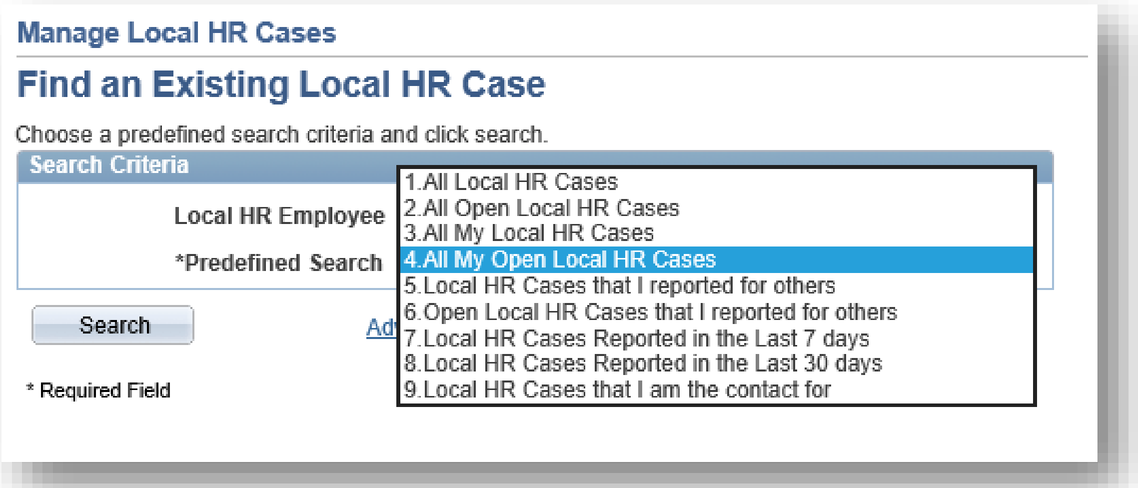
This case will be associated to John Smith’s record but will not be visible to him on his self-service account. **Mary Murphy** will receive the auto-generated emails.

Monitoring a Local HR case

Mary Murphy can view all of her own Local HR cases by clicking ‘Local HR - Manage Cases’ on the homepage and selecting ‘Local HR Cases that I reported for others’. This brings up a list of all HR cases that Mary has raised on behalf of other staff.

Mary can also access HR cases raised by other members of her Local HR divison. In the drodown menu for Predefined Search, she can choose from 9 options when searching for Local HR cases;

1. All Local HR Cases
2. All Open Local HR Cases
3. All My Local HR Cases
4. All My Open Local HR Cases
5. Local HR Cases that I reported for others
6. Open Local HR Cases that I reported for others
7. Local HR Cases Reported in the Last 7 days
8. Local HR Cases Reported in the Last 30 days
9. Local HR Cases that I am the contact for

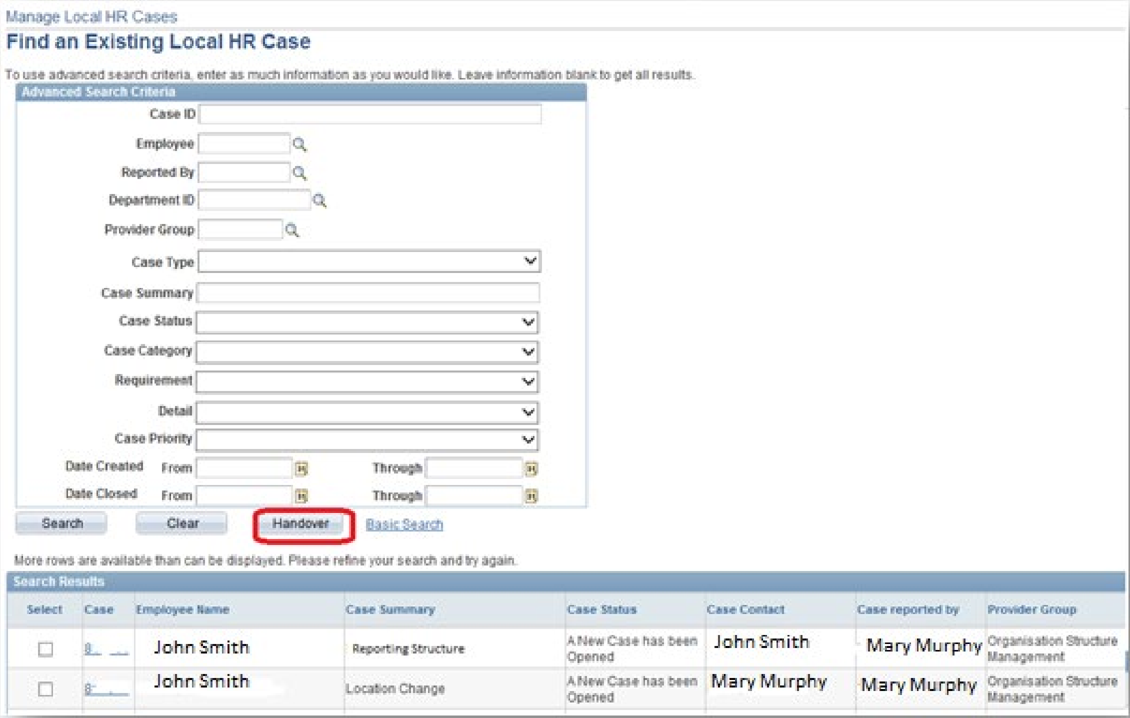


Case Handover Process

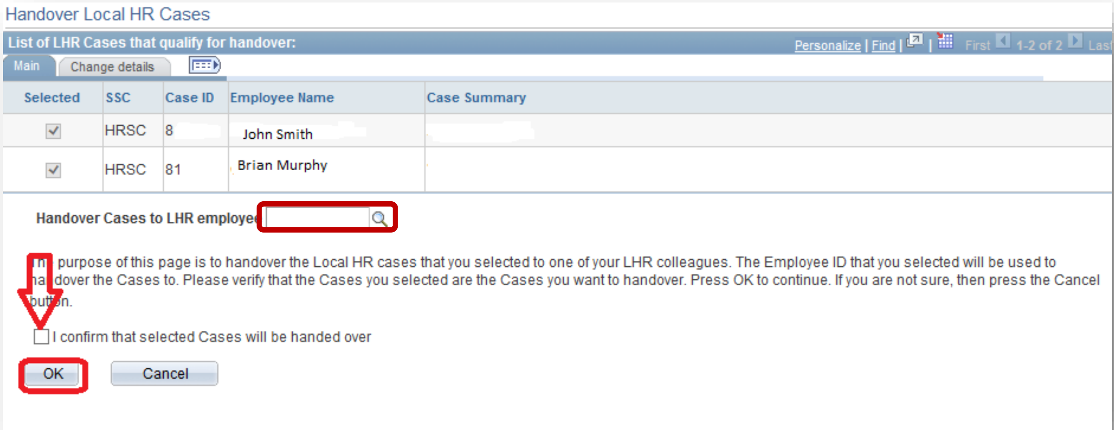
When a Local HR user is leaving their department, or leaving the HR unit, all of their HR cases (both open and closed) must be transferred to another member of HR in **advance** of their departure.

To do this, log in and select Local HR - Handover Cases from the homepage.

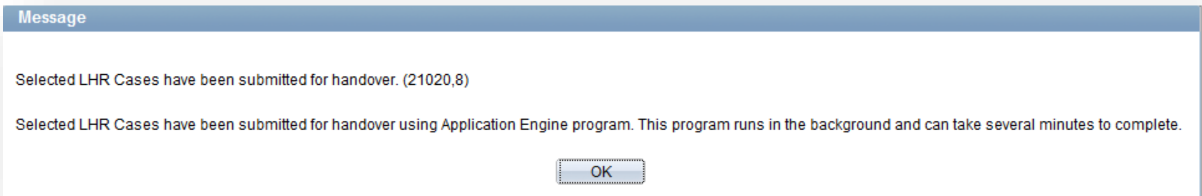
Your own details will be automatically populated in the Employee field. You can enter more details to narrow the search; in this example all information has been left blank to receive all results. Pressing search provides a list of cases matching the search criteria, and will also show a handover button.



The list of cases will show the ‘case contact’ and the ‘case reported by’. Select the cases to be handed over by ticking the boxes in the leftmost column, and then press the ‘handover’ button. You will be prompted to select the person to whom the cases are being handed over. Click the magnifying glass icon to see a list of the available Local HR staff within the PSB.



Select the Local HR user chosen to receive the cases, tick the confirmation box, and press ‘OK’. To show this request been actioned the following message will appear.



This message explains that the handover will not happen immediately, but may take a few minutes to process. Once the handover is completed, the Local HR recipient will have the selected cases listed against their name.

For more information and user guides, please visit www.nsso.gov.ie, and especially the dedicated section for HR Staff.

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