

Quick guide

LCC - HR Attendance process – Case guide

The case guide for the Attendance process is available in your F2 environment when creating new cases or it can be added to opened cases.

It has been designed to follow the Attendance case type process and it is intended to support the work around the Attendance cases in the HR team, directly in F2.

How to get started with the case guide:

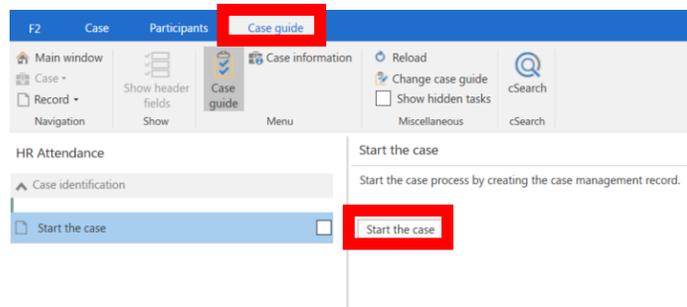
1. Open the F2 app from your desktop

Create a case with case guide

2. From the Main Window in F2 click on 'New record', add record to a new case: click '+' or 'New' in the Case field.
3. When the Case window opens, select the case guide called 'HR Attendance' in the drop down from the last field called 'Case guide'. Click Ok.

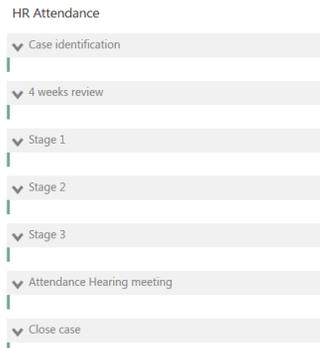


4. From the record window, navigate to the case (top left of the menu ribbon). You can now find the case guide on the top right blue ribbon, in the tab called 'Case guide'.



5. Click on button 'Start the case'. A checklist with different phases and tasks is displayed on the left panel.

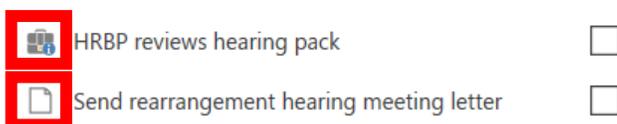
Case guide



6. The checklist follows the process flow for Attendance cases and divides the process in **'Phases'** and **'Tasks'**. The tasks are in order and depending on the case handled, not all tasks must be completed.



7. **Phases** are the high-level steps of the process, and they include a list of tasks.
 8. A **task** tells what actions should be completed in order to process the case and conclude each phase. A task can be of 2 types: **'Case info'** or **'Create record'**.



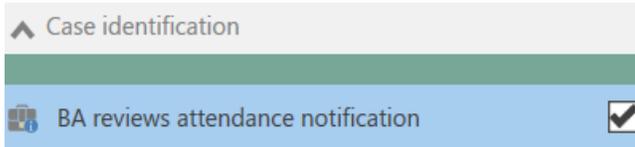
1. **Case info:** it displays different actions, such as to do action (checkboxes), decisions (Yes, No using a dropdown) and text fields to record outcome or notes. Remember to click on button 'Edit' in order to edit a task, then 'Save' once the changes are done.



2. **Create record:** it allows creating a record that contains a document template relevant to complete the specific task. Simply click on the button 'Create record'.



3. When a task is completed, a checkbox is manually ticked. This gives a visual indication of the tasks that have been completed, how far one is in the process and the next action to perform.



Document templates

1. When a task like 'BA contacts Line Manager' is selected, an option to create a document template is available. A text indication can be found in the checkbox list: 'Send the Welfare Support Meeting letter' and the 'Create record' button is available.

BA contacts Line Manager

Complete the following task only when the employee has not returned to work.

4 weeks review

If the employee has not returned to work

Arrange informal welfare meeting between LM and employee:

Review need for OH referral:

Send the Welfare Support Meeting letter ('Create record' button):

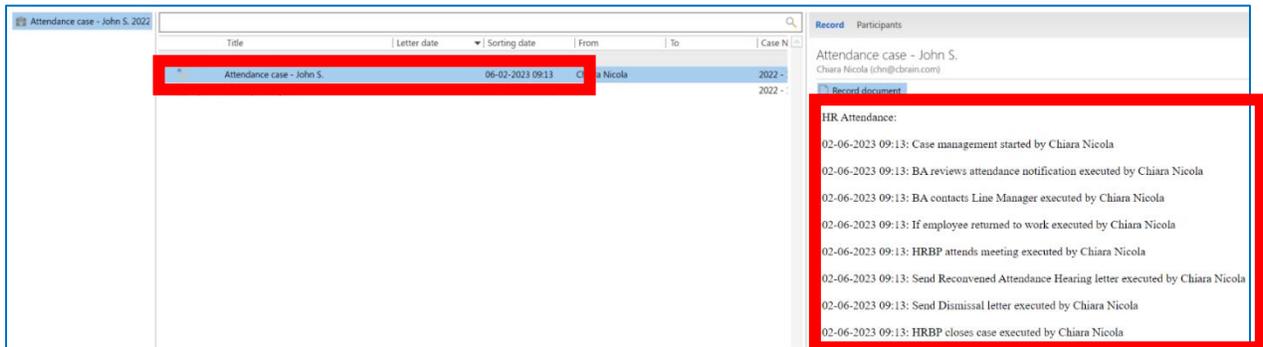


2. The document templates used for the Attendance process will automatically merge some information related to e.g. the 'Case participant', only if the case participant is already added to the case.

Title:	Test		
Responsible:	Chiara Nicola (Case manager, HR)	Status:	In progress
Suppl. case mgr.:		Keyword:	
Limited access:		Case participants:	Emil Dalsjo Buhl (Case manager, Council)
Deadline:		Oracle ID No.:	
Case type:		Directorate:	
		Previous case No.:	
		External ID:	
		Outcome:	
		External access:	Open
		Disposal code:	

Log record

1. When a task is checked as completed, the action is logged in a 'Control record' (to be found in the case once the case has started), with a date, time and responsible (see pic below).



Close case

Once the case is completed, the case must be closed.

When the last task in the checklist 'Close case' is checked as completed, the case in F2 is closed. The task reminds you to add an 'Outcome' to the case before closing.

Attach case guide on an existing open case

1. The case guide can be added from the case window, using the button called 'Case guide' and selecting the Attendance case guide (see pic below), when an existing open case does not have one.

