

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:

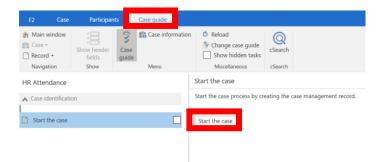
1. Open the F2 app from your desktop

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.

New case		x
No template		•
Title		
Case Guide:		▼
	OK	Cancel

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.



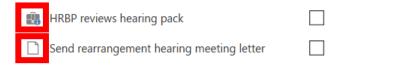
Case guide

HR Attendance
✓ Case identification
1
✓ 4 weeks review
1
✓ Stage 1
I
✓ Stage 2
1
✓ Stage 3
1
✓ Attendance Hearing meeting
1
✓ Close case

 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.

▲ 4 weeks review	 Phase
BA contacts Line Manager	 Task
If employee returned to work	Task

- 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'**.



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

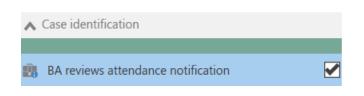
Edit Save	Cancel
-----------	--------

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

	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

 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 Walfare 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', <u>only if the case participant is already added to the case</u>.

Title:	Test							
Responsible:	Chiara Nicola (Case manager, HR) -	28	Status:	In progress	Ψ.			
 Hide fields 								
Suppl. case mgr.:		22	Keyword:		\Diamond	Previous case No:		
					Ja .	External ID:		
Limited access:		28	Case participants:	Emil Dalsjø Buhl (Case manager, Council) 🕶	<u>.</u> 2	Outcome:		
					2	External access:	Open	
Deadline:		7	Oracle ID No:					
Case type:			Directorate:			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).

🏥 Attendance case - John S. 2022						Q	Record Participants
	Title	Letter date	▼ Sorting date	From	To	Case N	Attendance case - John S.
	Attendance case - John S.		06-02-2023 09:13	Ci a Nicola		2022 -	Chiara Nicola (chn@cbrain.com)
•						2022 - :	Record document
							HR Attendance:
							02-06-2023 09:13: Case management started by Chiara Nicola
							02-06-2023 09:13: BA reviews attendance notification executed by Chiara Nicola
							02-06-2023 09:13: BA contacts Line Manager executed by Chiara Nicola
							02-06-2023 09:13: If employee returned to work executed by Chiara Nicola
							02-06-2023 09:13: HRBP attends meeting executed by Chiara Nicola
							02-06-2023 09:13: Send Reconvened Attendance Hearing letter executed by Chiara Nicola
							02-06-2023 09:13: Send Dismissal letter executed by Chiara Nicola
							02-06-2023 09:13: HRBP closes case executed by Chiara Nicola

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.

F2 Case	Participants	FOI							•				
 Main window Gase ▼	Edit Cancel	New New		New e-Boks New output mana New	iger Nev Nev	v Add	Add F2 Manager	Add case guide	Set case to 'Complete' Status		older structur h record list Right align	Aut	o E
Title:	Test Appeal - Brid	get B											
Responsible:	Chiara Nicola (Case manager, Hl	R) 🕶	22	Status:		In pro	ogress					
Show more fields													
📳 Test Appeal - Bri	idget B 2022 - :												
		Tit			Lette	r date	▼ So	orting date	From		То		Case N
	·	Letter date: (no	items): 1 item(I request report		(👍 Add	case gu	iide	-	∎ ×			2022 - :
					c	ase Guide	:			•			
					L			HR Attenda	ince				