CASE MANAGEMENT OVERVIEW
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Description: This quick guide provides background information on the fields used when creating cases. Information included:

- Case Record Types
- Service Request vs. Incident
- Consumer Information
- Case Status
- Impact
- Consumer Reported Urgency
- Case Priority and Case Priority Calculation
- Incident Priority Model
- Service Offering Info
- Additional Case Information

Related resources on the MyFSU Service Center page

- Creating and Working a Case

Created: 12/8/2020
CASE RECORD TYPES

Expanded list of case types:
  o Case Management
    o FSU Service Request
      o Need something
    o Classroom Support
  o FSU Incident
    o Something broken
SERVICE REQUEST VS. INCIDENT

- FSU Service Request
  - I need something
    - I don’t have something I need or I need something new
    - Examples: computer, website, communication
- FSU Incident
  - Something is broken
    - I have something and it not working as expected
    - Examples for ITS: Password reset, WIFI is not working
- Some nuances
  - Anything that doesn't work as anticipated (system error so I can't reset my PW) = Incident.
  - I need something that isn't broken (such as I need my PW reset) = Service Request.
CONSUMER INFORMATION

- Contact information for consumer originates from data warehouse (Student Central/HR)
  - If consumer does not have FSU contact information, you can add alt info such as name, email and phone.
  - You can search for individuals by their name, email, EMPID, FSUID, etc.
  - Can add a new contact for individuals who are not in the system such as a parent, vendor, etc.
    - This is similar to how an anonymous caller was created in PeopleSoft CRM
    - If as an agent you need to update your personal contact information this happens in PeopleSoft HR.

- Preferred Contact Info
  - Comes from consumer if web form is used
**CASE STATUS**

Every Case record has a status. Status is displayed in a path component across the top of the record, with current status highlighted.

- **New:** Case has recently been entered. No agent has been assigned to the case.
- **Working:** The case will automatically be changed to Working once assigned to an agent. (currently in progress)
- **Waiting – Consumer:** Pending information from the consumer (manual).
- **Waiting – Vendor:** Pending information from a vendor (manual).
- **Waiting – Internal:** Pending for internal reasons (manual).
- **Closed:** The case has been closed.

1. Open the Case to update status
2. Along the top of the screen, note current status is highlighted, and other statuses are listed.
3. To update **Case Status**, click on desired status and click **Mark as Current Status**.
4. The status is checked and the next status is highlighted.

Main reason for Working status, is to validate that cases are reviewed and assigned.
IMPACT

- Impact allows the agent to select the severity of the consumer problem.
  - None
  - Critical
  - Major
  - Minor
  - Small
## CONSUMER REPORTED URGENCY

<table>
<thead>
<tr>
<th>Priority</th>
<th>Description</th>
<th>Response Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Impacts a specific customer’s ability to work for a short time. These cases are generally less time-sensitive or do not require immediate resolution.</td>
<td>8 bus hrs</td>
</tr>
<tr>
<td>Medium</td>
<td>Represents problems that impact one or more customers. Does not significantly impact productivity because alternative resources or workarounds are available.</td>
<td>4 bus hrs</td>
</tr>
<tr>
<td>High</td>
<td>Represents problems that impact one or more users’ ability to perform normal daily tasks. Though few customers may be impacted, these problems require timely responses.</td>
<td>2 bus hrs</td>
</tr>
<tr>
<td>Immediate/formerly critical</td>
<td>Represents problems that require an expedited response. These cases may impact a large group of users or cause a significant disruption to one or more users. Customers reporting critical cases should also call the ITS Service Desk to ensure expedited response time.</td>
<td>Immediate – within 30 mins</td>
</tr>
</tbody>
</table>
CASE PRIORITY

- This is a calculated field based on a combination of consumer/customer urgency and impact based on our Incident Priority Model.
- These are the case priorities:
  - P5 - Low
  - P4 - Medium
  - P3 - High
  - P2 - Critical
  - P1 - Major Incident

Note: Priority descriptions are not listed on drop-down. View Incident Priority Model in additional information.
HOW IS CASE PRIORITY CALCULATED?

Calculations are determined by:
Urgency + Impact = Priority

*If Impact is not selected Priority will default to P3

- What makes a case a P1 – Major Incident
- What makes a case a P2 – Critical

Note: Priority plays a bigger role with Incidents than Service Requests
## INCIDENT PRIORITY MODEL

<table>
<thead>
<tr>
<th>Priority</th>
<th>Critical Impact</th>
<th>Major Impact</th>
<th>Minor Impact</th>
<th>Small Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Urgency</td>
<td>Campus-wide or multiple locations’ business critical service down</td>
<td>Campus-wide service working, but degraded performance or function</td>
<td>Single location’s service degraded</td>
<td>Non-VIP Single user affected</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Single location’s service completely down</td>
<td>2-9 users</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Single VIP user affected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High Urgency</td>
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<td></td>
</tr>
<tr>
<td>Medium Urgency</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Urgency</td>
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</tr>
</tbody>
</table>

### Immediate Urgency
- No viable or complex alternative solution/workaround
- Significant financial/reputation risk or implications
- User submits “Immediate” urgency or indicates emergency on Service Desk phone call

### High Urgency
- Moderately complex alternative resolution/workaround
- Moderate financial / reputation risk or implications
- User submits “High” urgency

### Medium Urgency
- Easy alternative solution/workaround
- Failover in place
- Low financial/reputation risk or implications
- User submits “Medium” urgency

### Low Urgency
- Easy alternative solution/workaround
- Failover in place
- Minimal financial/reputation risk or implications
- User submits “Low” urgency
## SERVICE OFFERING INFO

- **Category, Type and Details**
  - Only **Category** is required.

### Service Offering Info

<table>
<thead>
<tr>
<th><strong>Category</strong></th>
<th><strong>IT Support Services</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td><strong>Servers &amp; Storage</strong></td>
</tr>
<tr>
<td><strong>Details</strong></td>
<td><strong>File Storage</strong></td>
</tr>
</tbody>
</table>

*View all dependencies*
ADDITIONAL CASE INFORMATION

The following details are optional:

**Case Detail (additional)** – Used by ITS for reporting

**Assets** - List of assets or equipment related to the case

**Type** - If you have a standard change, you can use the **Planned Maintenance** to designate a start and end time for this work.