COLLABORATING INTERNALLY ON A CASE
QUICK GUIDE
COLLABORATING INTERNALLY

Description: This quick guide provides the steps necessary to communicate internally with colleagues as you work cases.
Steps to perform the following are included:
- Internal Communication Overview
- Internal Emails - System Generated
- Chatter
- Follow a Case
- Escalate a Case
- Create Tasks
- Create Events
- Additional Knowledge Resources

Related resources on the MyFSU Service Center page
- Creating and Working a Case
- Collaborating with Consumer

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myFSU Service Center offers many ways to communicate internally on a case.

1. Start by viewing existing case history if it exists.
2. When communicating on a case, if you are waiting on another's action to continue working the case, you may need to update case status to Waiting – Internal.
INTERNAL CASE COMMUNICATION

System notifications are generated for the following action:

- Case Assignment | Provider Group Queue (Case Owner)
CHATTER

- All Chatter Posts live on the case record.
- You can post updates and tag other internal users to alert them on case updates.
- You can tag individuals @

1. Open a case record.
2. Click Chatter tab and then Post tab.
3. Write your post.
4. Tag an internal user by entering the @ symbol and append their name. As you start typing name, names will populate.
5. Select name of user to appear in Post.
6. Click Share.
7. The individual receives chatter notification. Notification appears in bell icon in the upper right of the screen. Note: The notification links directly to the post.
FOLLOW A CASE

Managers can follow cases an agent is working on and receive update in the Chatter feed on the case.

Agents can follow cases assigned to another provider group.

1. Open a case
2. In the section above the case status bar, click + Follow
3. The button text changes to Following, It will display Unfollow if you hover over it.
4. To Unfollow, simply click the button to change.
5. After following a case, you will receive notifications in Service Center when the case is updated.

Note: Updates can also be viewed from the Chatter Feed at bottom left of screen or on your Home page and the Chatter section in your navigation bar.
ESCALATE A CASE

An agent in a provider group may be assigned a case that needs to be escalated to work and/or solve. This will change the owner and owner will receive an in-system notification.

1. Open the Case to escalate
2. Click the Chatter tab
3. Click Escalate to manager
4. In the Case Owner field, search for and select the appropriate manager
5. In Escalation Note, write applicable details
6. Click Save

Note that an Escalation Details tab appears on the left side of the screen on the case detail record

On the case details tab, under Additional Information note that the Escalated checkbox is checked
CREATE TASKS

- Can assign tasks for yourself or other team member to take action on a case. This will allow you to retain ownership of the case.
- Your **Upcoming Tasks** show up on **Home** tab
- Use of this option is determined by your **Provider Group Manager**

1. Navigate to case
2. Click **Related** tab
3. Go to **Open Activities**
4. Click **New Task**
5. Fill out **Task Information** and **Additional Information**. Required fields have an *.
6. Click **Save** or **Save & New** to add additional tasks.
CREATE EVENTS

• An event is scheduled for a specific day and time.
• Use this function to track meetings events, etc.
• Use of this option is determined by your Provider Group Manager

1. Navigate to case
2. Click Related tab
3. Go to Open Activities
4. Click on New Event
5. Enter needed information
6. Click Save

If assigned to yourself, the event will appear in the My Upcoming Events component on the Home screen
For more detailed information, see the Knowledge articles linked below. For more articles, go to Knowledge and select the “Agent Training Articles” list. You can also search for the #AgentTraining topic and go to the Related section of that topic page.

Knowledge articles in the myFSU Service Center may be archived or removed over time. If you are unable to locate an article by the link included in this training document, please be sure to search for the article by name instead.

How do I search for cases in myFSU Service Center?
How do I mention or tag another agent?
How do I follow a case in myFSU Service Center?
How to escalate a case to a manager?
How do I create a Chatter Stream in myFSU Service Center?
How do I receive Chatter notifications and manage their frequency?
How do I assign a task for a case in myFSU Service Center?