TRAINING GOALS

- Learn case features from case intake to case closure.
- Learn how to communicate with our customer/consumer and with other agents.
POST TRAINING

- For questions after the training session, create a case in myFSU Service Center and assign:
  - **Category** - ITS Support Services
  - **Type** - ITS Support
  - **Detail** - myFSU Service Center
AGENDA

- Case Intake, Assignment and Routing.
- Case Management Overview.
- Creating, Owning and Working a Case.
- Collaborating with Customer/Consumer.
- Collaborating Internally on a Case.
- Case Closing and Reopening.
- Additional Information.
- Next Steps.
COLLABORATING INTERNALLY
INTERNAL CASE COMMUNICATION

System generated notifications:

- Case Assignment | Queue (Case Owner).
- Case Assignment | Agent (Case Owner).

Sharing case information Agent to Agent:

- Chatter Post and tag (@) individuals.
- Tasks and Events.

Notes:

- There is a myFSU Service Center notifications guide available for agents under Quick Links on their Home page.
- When communicating on a case, if you are waiting on another agent’s or queue’s action, you should update the case status to Waiting – Internal.
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 bell notification links directly to the post.
CREATE TASK FROM A CASE

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

- You can assign tasks for yourself or other agents to take action on a case. This will allow you to retain ownership of the case.

- Your Upcoming Tasks show up on Home tab.

**Note:** Tasks can be assigned to a person, queue, or group.

- Assigning a task to a group will create multiple entries of the same task assigned to each member of the group.
- Assigning to a person or queue will create one task entry.
CREATE EVENT FROM A CASE

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.

- An event is scheduled for a specific day and time.
- Use this function to track meetings events, etc.
- If assigned to yourself, the event will appear in the My Upcoming Events component on the Home screen.
FOLLOW A CASE

Agents can follow cases being worked by another queue or agent to receive updates in their Chatter feed.

1. Open a case.
2. In the section above the case status bar, click + Follow.
3. The button text changes to Following, and it will display Unfollow if you hover over it.
4. To Unfollow, simply click the button to change.
5. After following a case, updates can 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

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.

An agent in a queue may be assigned a case that needs to be escalated to work and/or solve.

Escalating a case will change the Case Owner and that owner will receive an in-system notification.

Note: After escalating a case, an Escalation Details section will appear on the left side of the screen on the case record. On the case Details tab, under Additional Information, the Escalated box will be checked.
The half of knowledge is to know where to find knowledge.
WHAT'S NEXT

We encourage you to:

- Visit the ITS service page for myFSU Service Center quick guides, recordings and other training documentation.
- Access additional resources under Quick Links on your Home page in the myFSU Service Center.
- Go to the Knowledge section within the myFSU Service Center to view a list of Agent Training articles.
- Be on the lookout for a monthly newsletter for agents that features myFSU Service Center tips, updates, statistics and more!
REMEMBER TO LOG QUESTIONS

- For questions after the training session, create a case in myFSU Service Center and assign:
  - **Category** - ITS Support Services
  - **Type** - ITS Support
  - **Detail** - myFSU Service Center