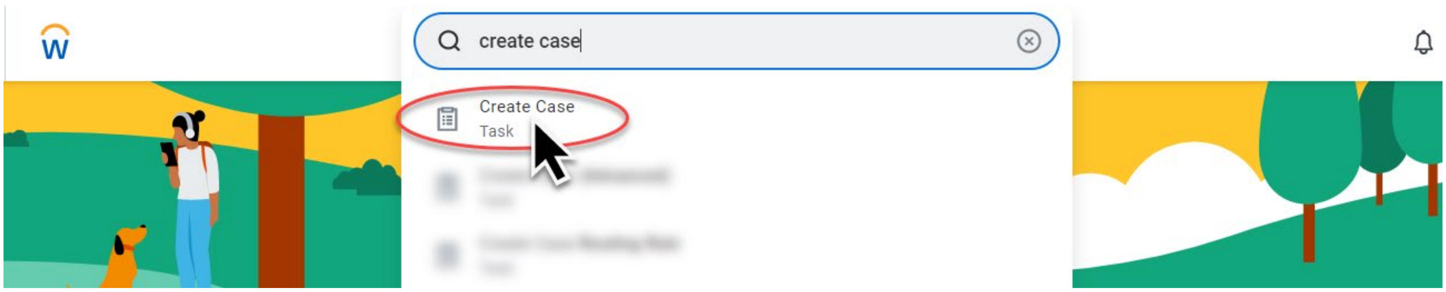
Creating an Investigative Case, in Workday

This job aid will provide step-by-step instructions on how to create a case for CHRO Investigations, as well as how to label agency level investigation cases.

Section 1 – Creating a case for CHRO Investigations Documentation

Step 1: From the Homepage, search for, and select the **Create Case** task.



Step 2: Fill in the case information.

A. Create For

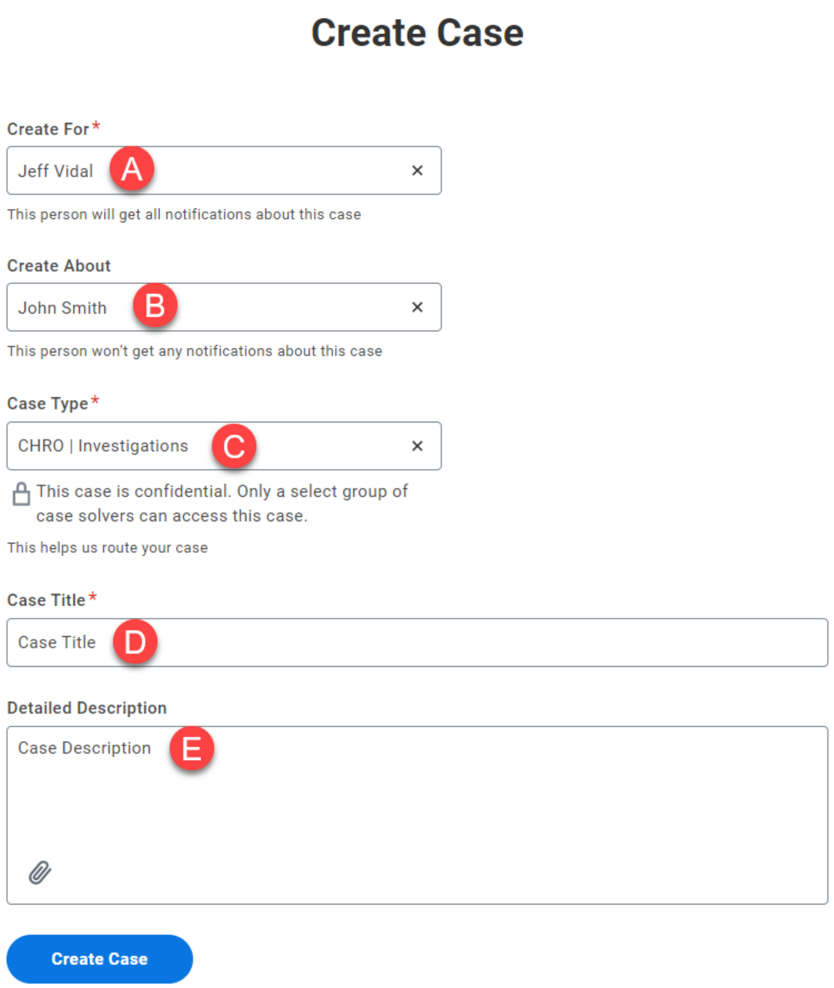
- This is *always you*, the case creator, you are the CHRO Investigation Team's customer. Cases created on behalf of someone other than a person with an appropriate elevated security role will be routed back to the agency or canceled, which ever option is available.

B. Created About

- Adding an employee to this field is optional, they will not get any notifications about the case. In the following example, since an employee is being added in the **Create About** field, including an OR# in the case title or description is not required.

C. Case Type

- Select the Case Type called "CHRO | Investigations", under DAS CHRO Support.



D. Case Title

- A descriptive title will assist the Service Team in identifying the appropriate case solver quickly.

E. Detailed Description

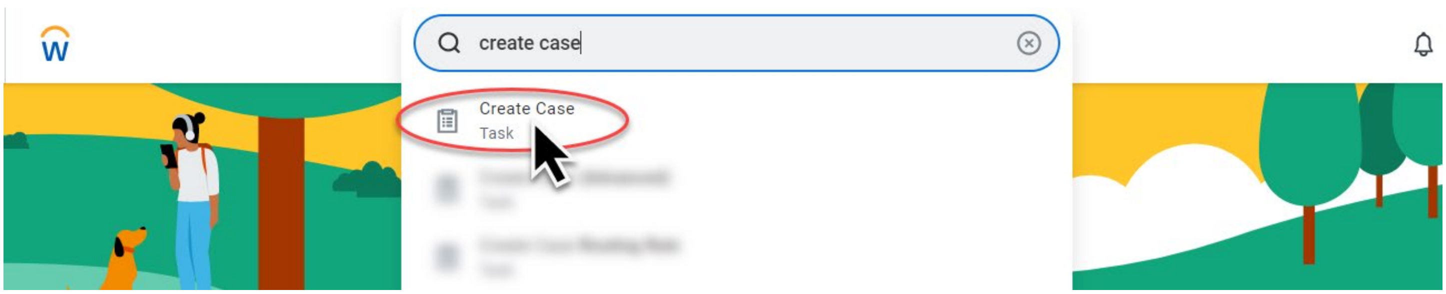
- Incomplete descriptions will cause a delay in support while the case solver works to understand the issue.

Once all information is completely filled in, click **Create Case**

Step 3: Interacting. Now that your case has been submitted, watch for Notifications **within Workday**. You will not receive email notifications. Notifications will show in the top right corner of your Workday screen. Look for the following icon:

Section 2 – Creating and Labeling <u>your agency level case</u>.

Step 1: From the Homepage, search for, and select the **Create Case** task.



Step 2: Fill in the case information.

A. Create For

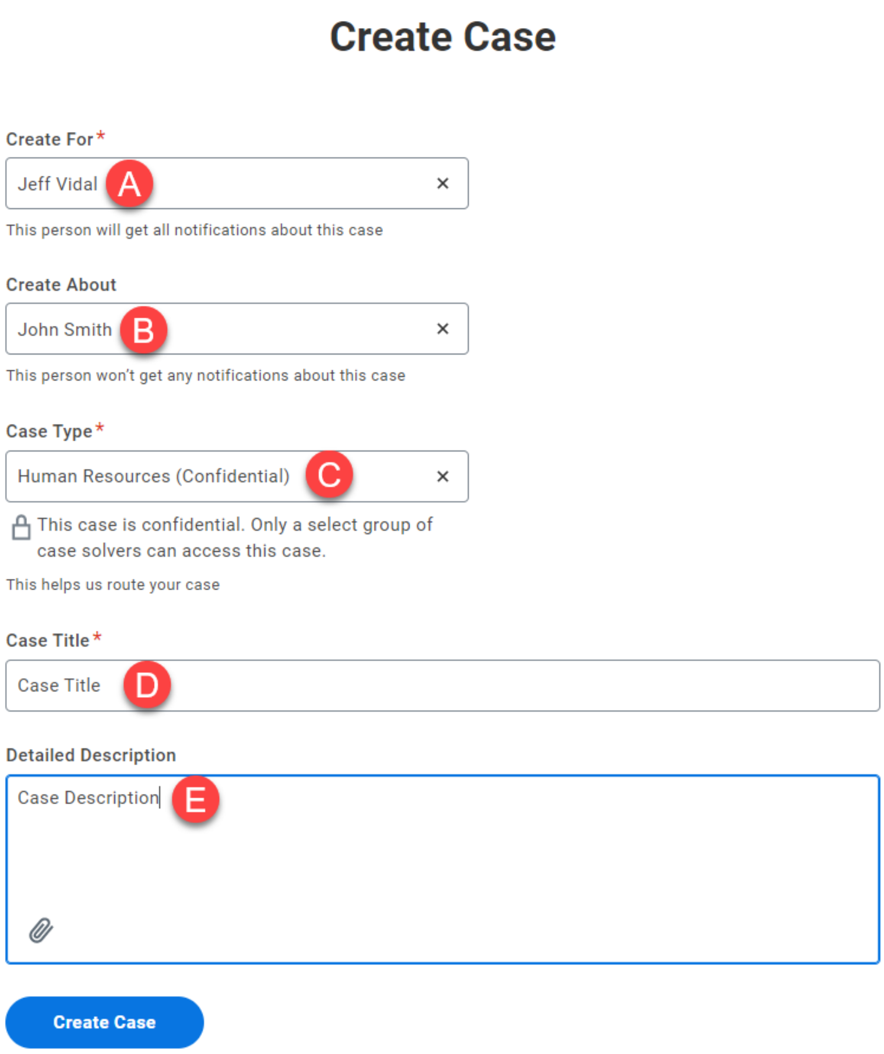
- This is *always you*, as the case creator, you will own this case.

B. Created About

- Adding an employee to this field is optional, they will not get any notifications about the case. In the following example, since an employee is being added in the **Create About** field, including an OR# in the case title or description is not required.

C. Case Type

- Select the Case Type called “Human Resources (Confidential)”, under Agency Support.



D. Case Title

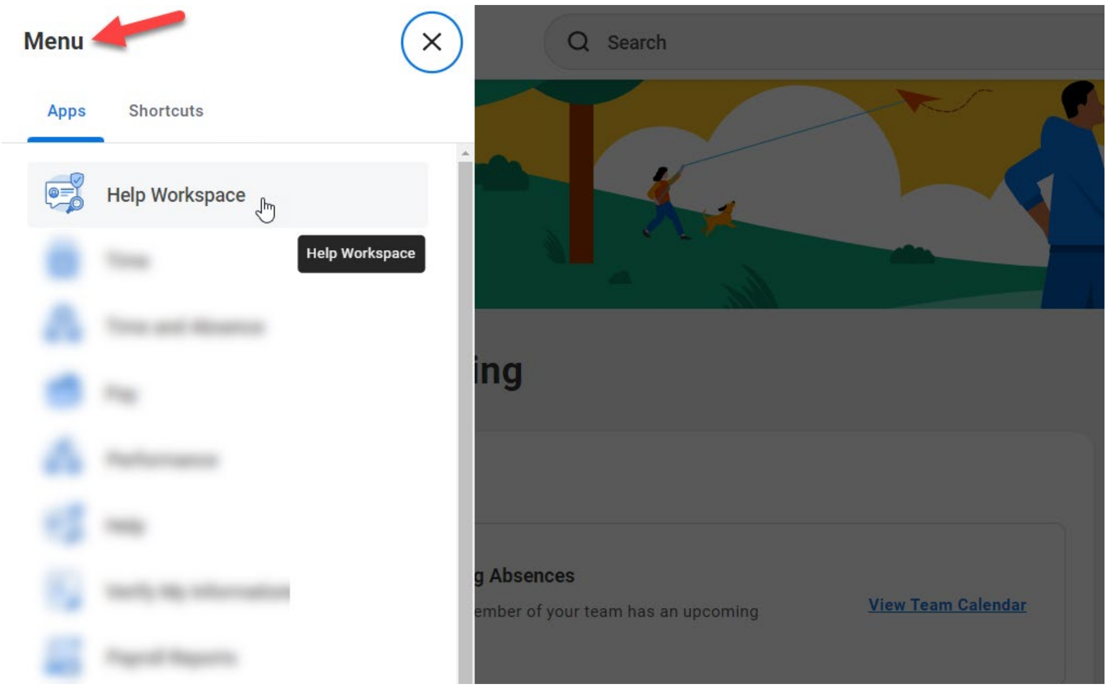
- A descriptive title will assist the Service Team in identifying the appropriate case solver quickly.

E. Detailed Description

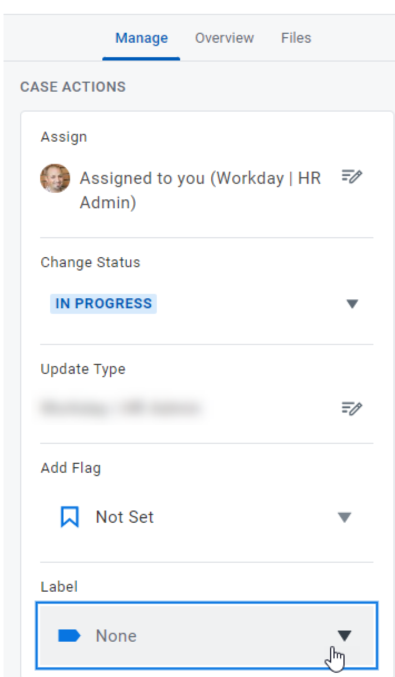
- Incomplete descriptions will cause a delay in support while the case solver works to understand the issue.

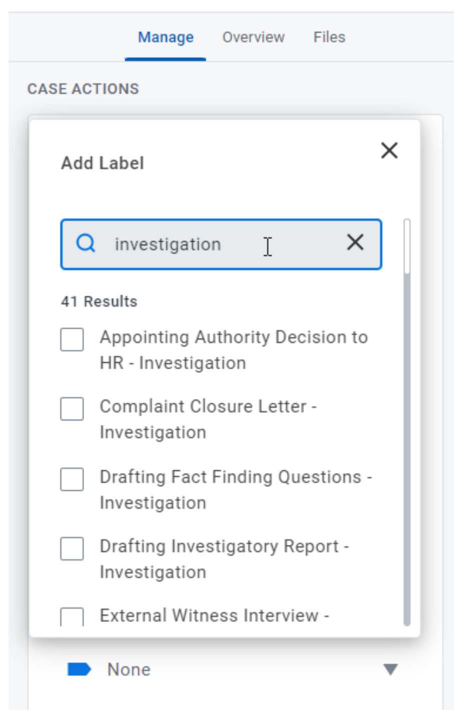
Once all information is completely filled in, click **Create Case**

Step 3: From the Homepage menu, select the Help Workspace Application.

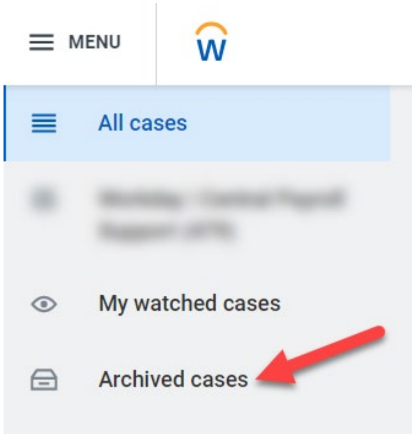


Step 4: Locate the newly created case, and assign label(s). On the right navigation, click into the Labels field, and search for "Investigation". Then scroll to add the appropriate label(s).

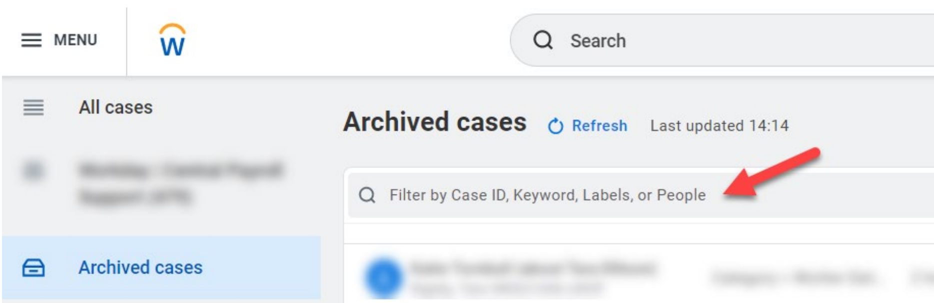




Step 5: Searching your Case Management Archive Folder. From your **Help Workspace**, on your left navigation, select “**Archived Cases**”.



Then, use the Archived Cases Search Field, to seach by Case ID, Keyword, Labels, or by People.



Additional Information

- You may need to use multiple labels to accurately describe a case. Labels are used for describing your case, as well as accurately reporting on cases using labels as a report facet.
- When you case is complete, please make sure it has a “Final Outcome” Label. Final Outcome labels are as follows:
  - Alleged Conduct Within Policy
  - Delivered to Employee
  - Document Delivered to Management
  - Not Sustained / Not Substantiated
  - Sustained / Substantiate
  - Insufficient Information - Suspended