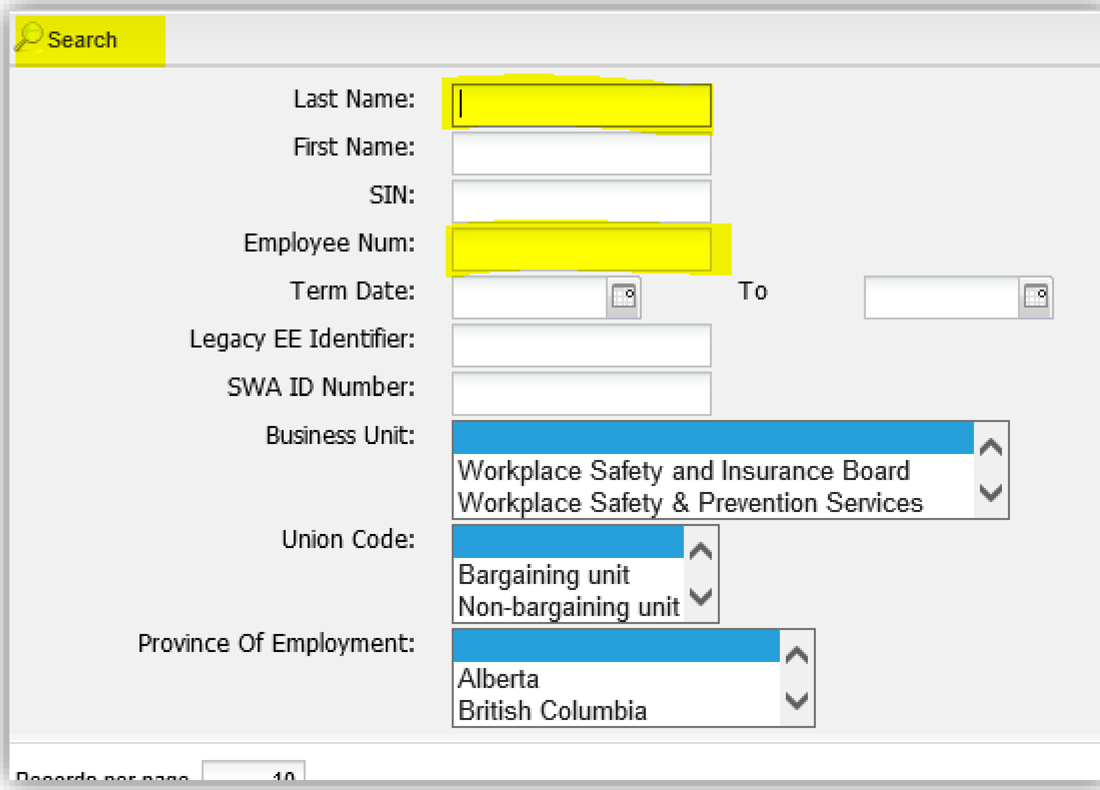
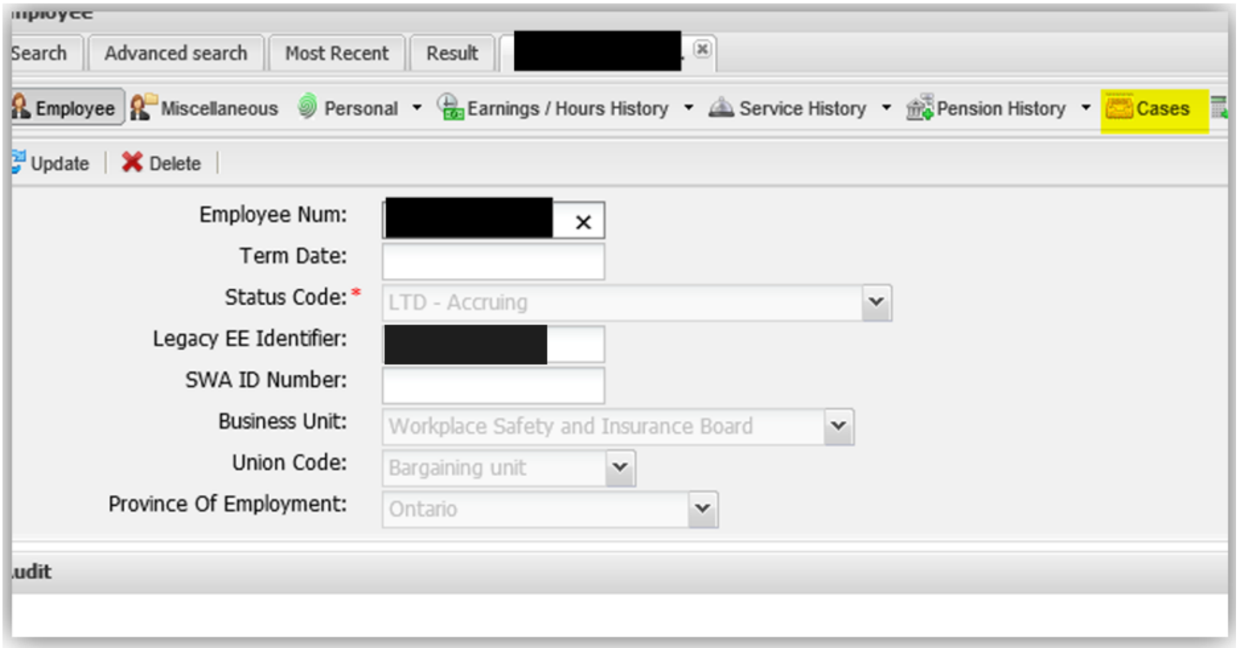
Creating/Responding to a Case in eePoint

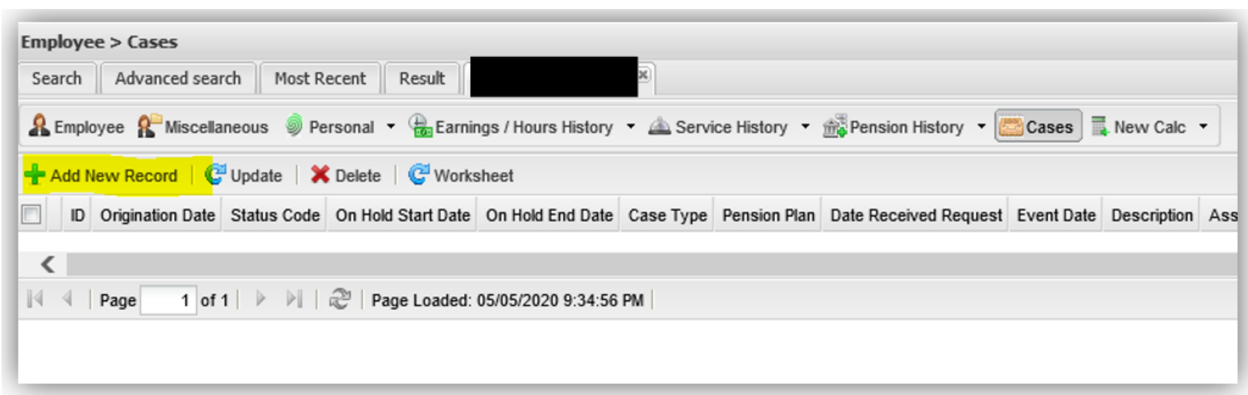
1. Open eepoint and type in member's last name & first name or employee ID, then hit 'Search'



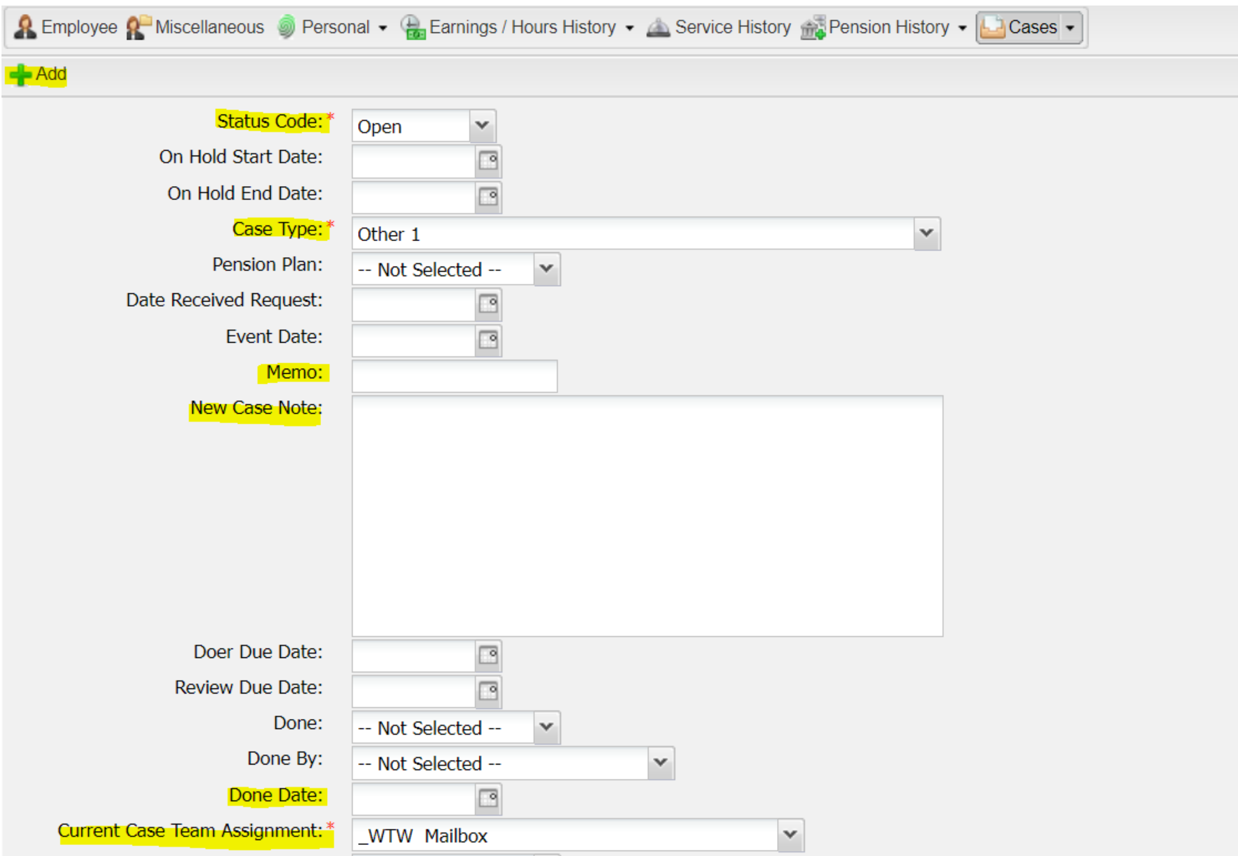
2. Once you're in the member's record, click on 'Cases' button (highlighted below)



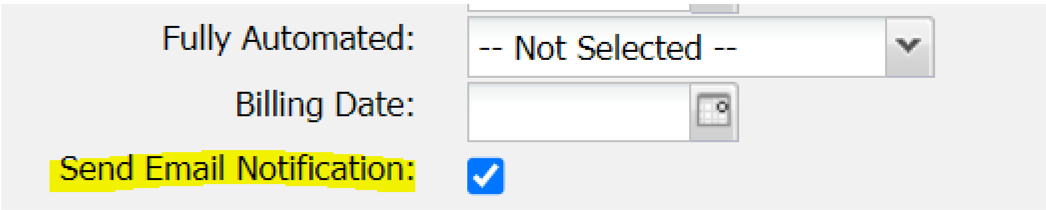
3. Click on 'Add New Record' to create a new case



4. Complete the information required as highlighted below.
    a. Under ‘Case Type’, select one of the case types on the dropdown list, pertaining to your query.
    b. Under ‘Memo’, please provide a short description of your question/query.
    c. Then type in the details of your case in the ‘New Case Note’ section.
    d. Complete the ‘Done Date’ (date when you create the new case).
    e. Under the ‘Assign To’ dropdown list, assign the case to the “_WTW Mailbox”.



5. It's important to check that the 'Send Email Notification' box at the bottom of the Case screen is ticked off, otherwise an email notification will not be sent out to notify the WTW team of the new case.



6. Once all the above information has been completed, click on 'Add' button (see in screenshot under step 4). An email notification will be received in the WTW mailbox.

NOTE:
To view the thread of notes that have been entered in the 'New Case Notes' field, you must click on **'Case Notes'**. Once you save a 'Case', the notes are moved to 'Case Notes' and you can view the thread here: