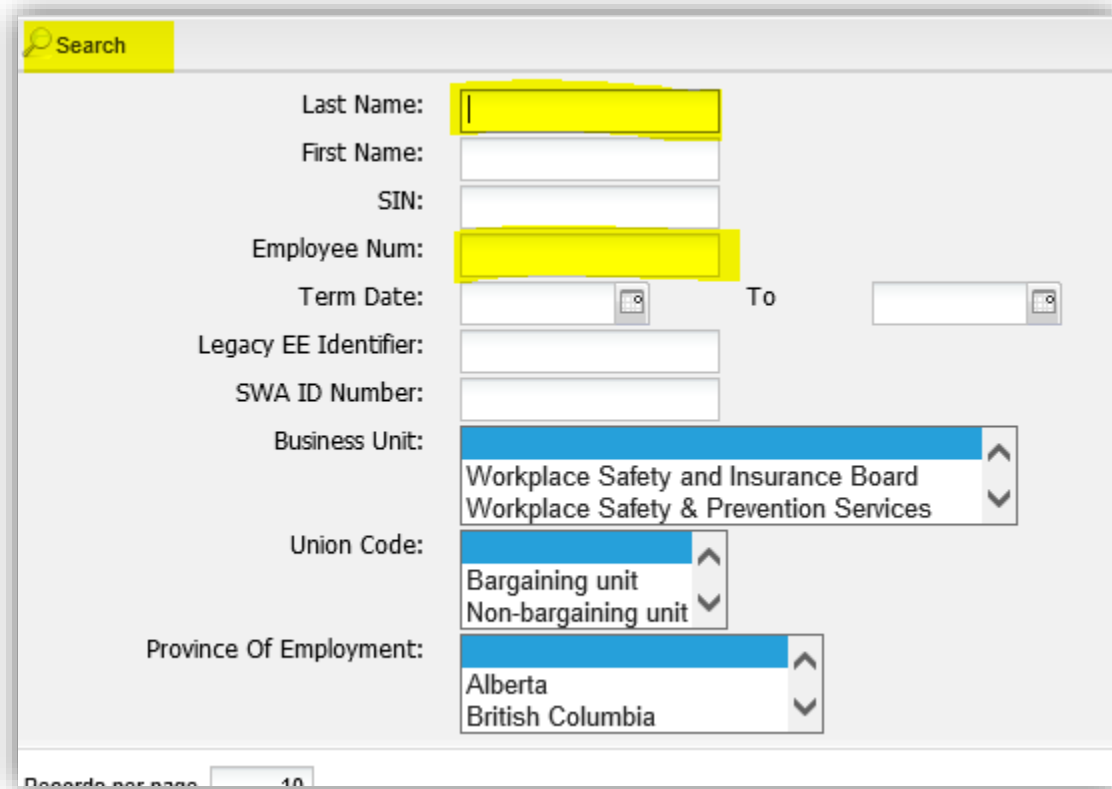


Creating/Responding to a Case in eePoint

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



The screenshot displays the search interface in eePoint. At the top left, there is a yellow 'Search' button with a magnifying glass icon. Below it, several search criteria are listed with corresponding input fields:

- Last Name: [Redacted]
- First Name: [Empty]
- SIN: [Empty]
- Employee Num: [Redacted]
- Term Date: [Empty] To [Empty]
- Legacy EE Identifier: [Empty]
- SWA ID Number: [Empty]
- Business Unit: [Dropdown menu with options: Workplace Safety and Insurance Board, Workplace Safety & Prevention Services]
- Union Code: [Dropdown menu with options: Bargaining unit, Non-bargaining unit]
- Province Of Employment: [Dropdown menu with options: Alberta, British Columbia]

At the bottom left, there is a 'Records per page' field set to '10'.

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

The screenshot shows the 'Employee' record page in a web application. The top navigation bar includes 'Employee', 'Miscellaneous', 'Personal', 'Earnings / Hours History', 'Service History', 'Pension History', and 'Cases' (highlighted in yellow). Below the navigation bar, there are 'Update' and 'Delete' buttons. The main form contains the following fields:

- Employee Num: [Redacted]
- Term Date: [Empty]
- Status Code: LTD - Accruing
- Legacy EE Identifier: [Redacted]
- SWA ID Number: [Empty]
- Business Unit: Workplace Safety and Insurance Board
- Union Code: Bargaining unit
- Province Of Employment: Ontario

At the bottom left, the word 'audit' is partially visible.

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

The screenshot shows the 'Employee > Cases' page. The top navigation bar includes 'Employee', 'Miscellaneous', 'Personal', 'Earnings / Hours History', 'Service History', 'Pension History', 'Cases' (highlighted in yellow), and 'New Calc'. Below the navigation bar, there are 'Add New Record' (highlighted in yellow), 'Update', 'Delete', and 'Worksheet' buttons. The main content area is a table with the following columns:

ID	Origination Date	Status Code	On Hold Start Date	On Hold End Date	Case Type	Pension Plan	Date Received Request	Event Date	Description	Ass
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At the bottom, there is a pagination bar showing 'Page 1 of 1' and a timestamp 'Page Loaded: 05/05/2020 9:34:56 PM'.

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

Employee Miscellaneous Personal Earnings / Hours History Service History Pension History Cases

+ Add

Status Code:* Open

On Hold Start Date:

On Hold End Date:

Case Type:* Other 1

Pension Plan: -- Not Selected --

Date Received Request:

Event Date:

Memo:

New Case Note:

Doer Due Date:

Review Due Date:

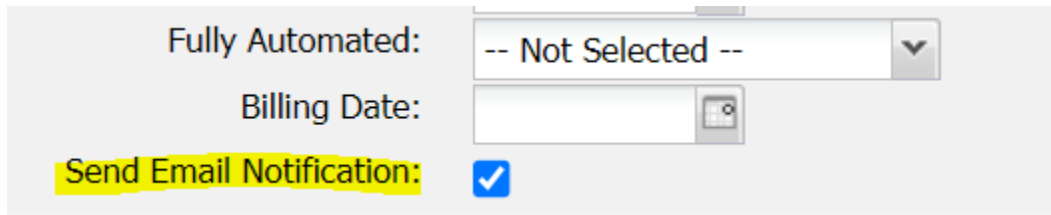
Done: -- Not Selected --

Done By: -- Not Selected --

Done Date:

Current Case Team Assignment:* _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.



Fully Automated: -- Not Selected --

Billing Date:

Send Email Notification:

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:

