# Infor Employee Resource Guide

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Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u> using your Chrome browser. Enter your Infor credentials provided to you in the "USERNAME" and PASSWORD" fields.

	infor
USERNAME	
PASSWORD	
	Sign On
	Forgot Password I Contact Us

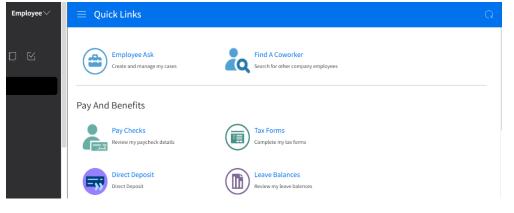
The first thing you will see is the home page. To get to Infor GHR, click the **Homepages** icon.

tomepages		Q Start Typing	*	<	
	Welcome to Infor Ming.le™				
	Create New Page Page Catalog				

The Homepages menu will open up and select Infor Global HR.

or Global Document HR Management	
	We
	Create N
	or Global Document HR Management

Then the **Employee Space** will appear

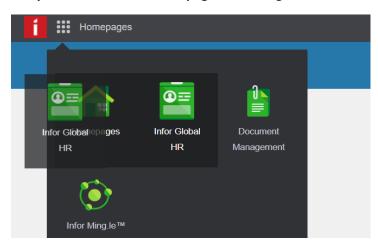


# **Rearrange Homepages Icons**

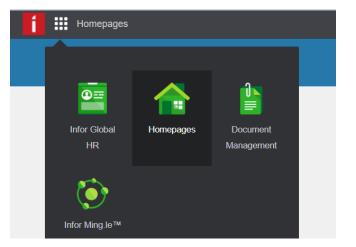
1. Click on Homepages icon

T T propages	Q Start Typing	<b>.</b> ≥ < R
Welcome to Infor Ming.le™		
Create New Page Page Catalog		

2. **Homepages** menu will open up. Place the mouse cursor over the **Infor Global HR** icon, press and hold down the left mouse button, then move the mouse to the left while still holding down the left mouse button. When you have "dragged" the object in front of the **Homepages** icon, let go of the left mouse button



3. The Infor Global HR icon has now taken the Homepages icon place



Now when you log into Infor, you will be taken directly to Infor Global HR

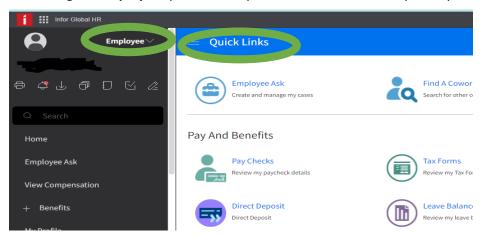
Employee 🗸	$\equiv~$ Quick Links		Q
0 1	Employee Ask Create and manage my cases	Find A Coworker Search for other company employees	
	Pay And Benefits		
	Pay Checks Review my paycheck details	Tax Forms Complete my tax forms	
	Direct Deposit Direct Deposit	Leave Balances Review my leave balences	

# Employee Self Service

What is Employee Self Service? Infor directly connects employees to their own data; you can now view, change, update, and add to your own information, on your own and on your own time! No more completing a form and waiting for that form to be processed by someone else. You hold the keys!

# Accessing your Employee Space

- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the **Employee** space. Most options are available directly from your **Quick Links**.



## View your Pay Checks & Compensation

- 1. Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links

Employee V	= Quick Links		Q
	Employee Ask Create and manage my cases	Find A Coworker Search for other company employees	
	Pay And Benefits		
	Pay Checks Review my paycheck details	Tax Forms Complete my tax forms	
	Direct Deposit Direct Deposit	Leave Balances Review my leave balences	

3. Select Pay Checks from the Quick Links in your Employee Space

Employee 🗸	$\equiv$ Quick Links		Q
	Employee Ask Create and manage my cases	Find A Coworker Search for other company employees	
	Pay And Benefits		
	Pay Checks Review my paycheck details	Tax Forms Complete my tax forms	
	Direct Deposit Direct Deposit	Leave Balances Review my leave balences	

4. Select the **Compensation** tab to view your Compensation by each Work Assignment and any Pay Rate History

Employee 🗸	$\equiv$ Pay Checks				Q	
	Pay Checks Bar	nk Details Compensation				
	Compensation By V	Nork Assignment				
	Position	Pay Rate	Pay Rate	Annual Salary	Currency	

#### Add your Direct Deposit Information

1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD

2. Ensure you're viewing the **Employee** space. Most options are available directly from your **Quick Links**.

Employee	a Quick Links	Q
	Employee Ask Create and manage my cases Find A Coworker Search for other company employees	
	Pay And Benefits	
	Pay Checks Review my paycheck details	
	Direct Deposit Direct Deposit	

3. Select **Pay Checks** from the **Quick Links** in your Employee Space. Your banking information can also be found and or updated from selecting **Direct Deposit** 

Employee 🗸	📃 Quick Links		Q
	Employee Ask Create and manage my cases	Find A Coworker Search for other company employees	
	Pay And Benefits		
	Pay Checks Review my paycheck details	Tax Forms Complete my tax forms	
	Direct Deposit Direct Deposit	Leave Balances Review my leave balences	

4. Select the **Bank Details** tab

Employee 🗸	$\equiv$ Pay Checks			Q
	Pay Check Bank Details Compensation			
	Bank Details		†] Add ∠	🖄 Update Bank Account 🛛 \cdots
	Bank	Routing Nu	Account Number	Flat Amo Percent

5. Select Add to Add a new direct deposit account

$\equiv$ Pay Che	ecks						
Pay Checks	Bank Details	Compensation					
Bank Details			t Add	🖉 Update Bank Account	⊘ Change Ord	er	
Bank			Routing Number	Account Number	Flat Amount	Perc	cent

6. The Authorization Statement will appear. If you agree, check the box and select Submit

tion te for Penn Highlands to direct deposit my checks to my specified banks. *Note: If he account(s) to recover/remove the funds.	unds are direct deposited to your account(s) in error, PH may initiate a debit transaction
e	
Cancel	Submit
	te for Penn Highlands to direct deposit my checks to my specified banks. *Note: If f he account(s) to recover/remove the funds.

7. Enter the routing number of your account or use the magnifying glass to select a routing number from the list of banks



There is a header (in black) that has a search option; type in your routing number there and hit enter.

\*NOTE\* - All routing numbers are 9-digit, but if any contain a leading "0", that 0 will not be displayed. Example, actual routing number is 031310552, but when you search for that number, you will see it as 31310552 (missing the leading 0).

Select 'Routing Number'			
Routing Numbe	ers	=	•••
Routing Number = • 11400495	Pescription		
11000138	BANK OF AMERICA		
11001234	MELLON TRUST OF NEW ENG	LAND, N.A.	
11201458	CAMDEN NATIONAL BANK		
11400495	Bank of America		
	$ \langle   \diamond \rangle \rangle$		10 🔻

8. Select the correct routing number and it will populate in the routing number field

Routing Number		
11400495	Q=	Bank of America

\*If the Routing Number or your bank name doesn't appear, please click **Cancel** and notify payroll.

9. Enter your **Account Number** – please be **very diligent** when entering banking numbers.

#### Select the Account Type

Select if it's an Amount and enter the Flat Amount, or a Percent and enter the percentage

Enter a Begin Date (Use today's date or a future date) or use the calendar icon to select a date

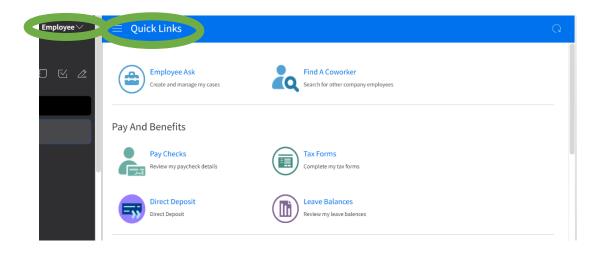


All other fields are optional

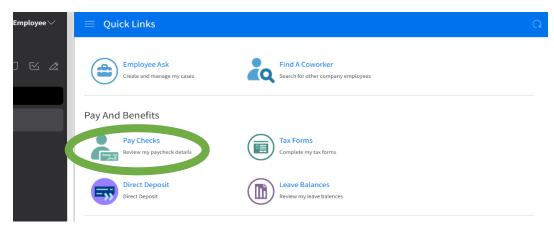
10. Select Submit

Update Direct Deposit information

- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the **Employee** space. Most options are available directly from your **Quick Links**.



3. Select **Pay Checks** from the **Quick Links** in your Employee Space. Your banking information can also be found and or updated from selecting **Direct Deposit** 



4. Select the **Bank Details** tab

Employee 🗸	$\equiv$ Pay Checks		Q
	Pay Check Bank Details Compensation		
	Bank Details	📩 Add 🛛 🖉 Update Bank	Account
	Bank	Routing Nu Account Number Flat Amo.	Percent

5. Click on the Account you wish to update and it will highlight blue

Employee 🗸	$\equiv$ Pay Checks			C	5
	Pay Checks Bank Details Compensation				
	Bank Details		† Add	🖉 Update Bank Account	
	Bank	Routing Nu	Account Number	Flat Amo	Percent
	BANK OF AMERICA Checking	11000138	183527409356	40.00	0 %

6. Select Update Bank Account

😑 Pay Check	S					
Pay Checks Ba	ank Details	Compensation				
Bank Details			†] Add	Update Bank Account	⊘ Change Orde	er
Bank			Routing Number	Account Number	Flat Amount	Percent

7. The Change Bank Details form will display

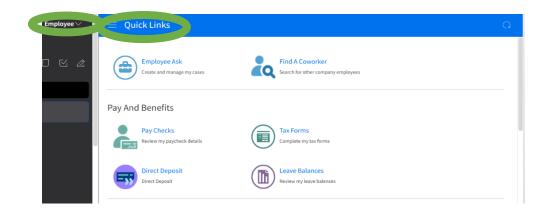
Update the banking information as desired (Routing Number, Account Number, and Account Type etc.) Update **Begin Date** (Use today's date or a future date)

\*If you want to completely remove this account from your current distribution, please complete the **end date** section under **other information**.

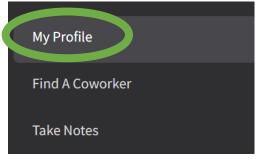
8. Select Submit

# Add your Emergency Contact(s)

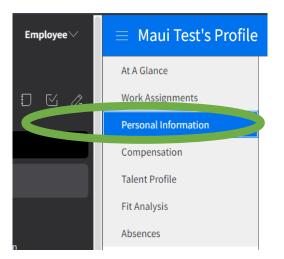
- 1. Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from the black menu on the left



4. Select **Personal Information** from your left menu



- 5. Scroll down to the Emergency Contacts section
- 6. Select Add Contact

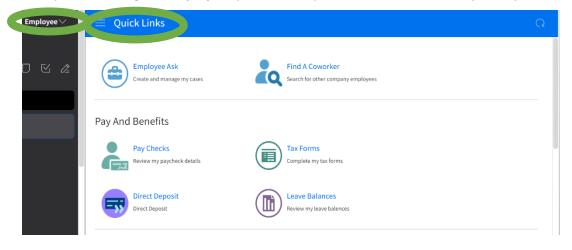


7. Enter today's date as the **Effective Date**, enter your contact's information. Ensure that the **Preferred Contact Method** matches the information fields you've completed. (Phone Country Code always = 1 in the US)

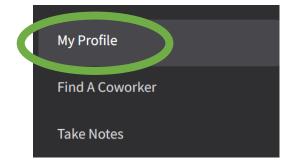
#### 8. Select Submit

Update your Emergency Contact Information

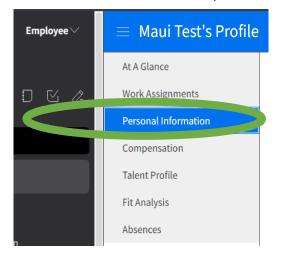
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from the black menu on the left



4. Select Personal Information from your left menu



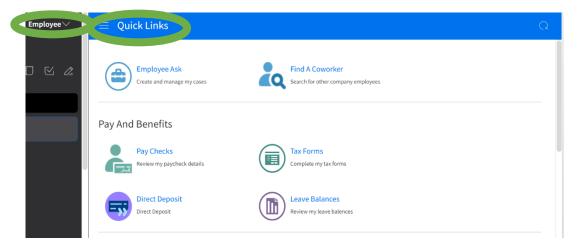
- 5. Scroll down to the Emergency Contacts section
- 6. Double click on the emergency contact information you want to update

Emergei	ncy Contacts		† Add Contact	🗇 Delete	•••
✓	Name	Preferred	Contact Detail		
	Schrute, Dwight	Yes	assistant to the regional manager @dunder mifflin.com		

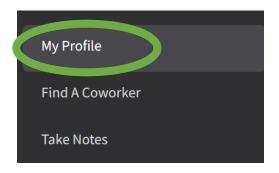
- 7. The Change Emergency Contact form will appear
- 8. Enter today's date as the Effective Date
- 9. Enter the updated contact information and click Submit

#### **Delete Emergency Contact Information**

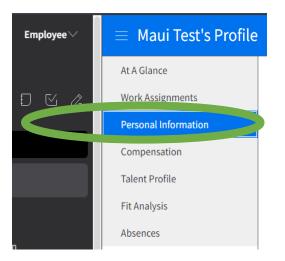
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



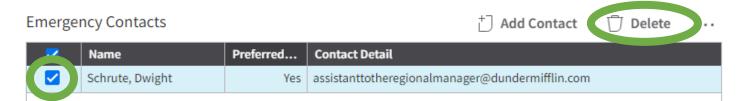
3. Select My Profile from the black menu on the left



4. Select Personal Information from your left menu

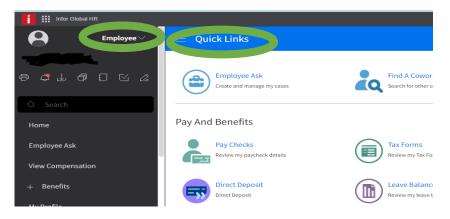


- 5. Scroll down to the Emergency Contacts section
- 6. Check the box beside that contact, click on their name to highlight them blue and then select Delete.

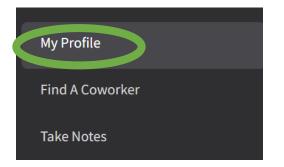


# Add Your Contact Information (Work Phone, Personal Phone, etc.)

- 1. Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>
- 2. Ensure you're viewing the **Employee** space. Most options are available directly from your **Quick Links**.



3. Select My Profile from black menu on the left



4. Select Personal Information from the left menu

Employee $\checkmark$	😑 Maui Test's Profile	🗎 Save  🕇 Add Address \cdots
	At A Glance	Maui Test - 190-75000-10871-01
	Work Assignments Personal Information	

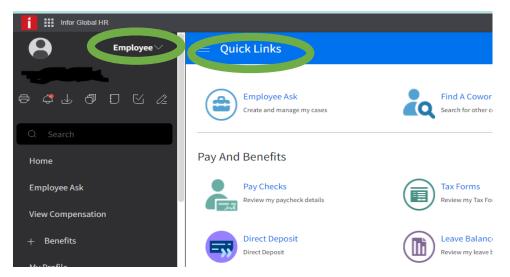
5. Select Add Phone or Add Email in the Contact information section to add a new contact



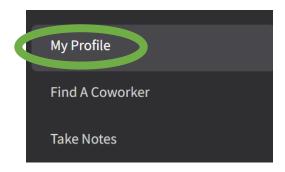
- Enter today's date as the Effective Date, enter your new contact information. Ensure that if entering a Telephone Type it matches the information fields you've completed. (Phone Country Code always = 1 in the US)
- 7. Click Submit

# **Change Your Contact Information**

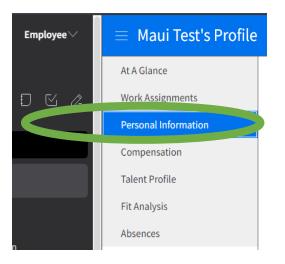
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from black menu on the left



4. Select Personal Information from your left menu



- 5. Double click on the contact information you want to update
- 6. The Update Email or Update Phone form will appear

# Update Email

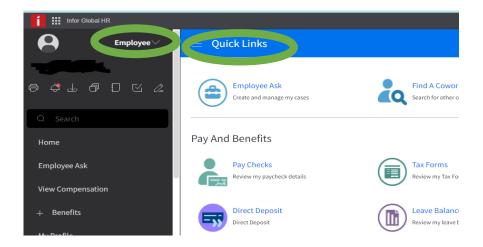
Employment ID	
902	Maui Test
Effective Date *	
✓ Active	
Description	
Email Address	
15693@testcompany.com	
Cancel	Submit

- 7. Enter today's date as the Effective Date
- 8. Enter your updated contact information and click Submit

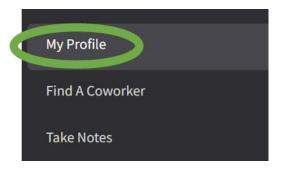
#### **Change Residential Address**

What is a Residential Address? This refers to where you actually live.

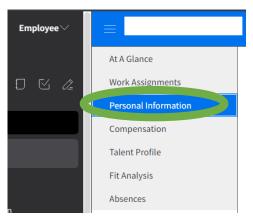
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from black menu on the left



4. Select Personal Information from your left menu



- 5. Scroll down to the Addresses section
- 6.
- 7. Check the box, beside your residential address and select Change Residential Address

Addresses			Add PO Box Address	] Change Residential Address 🛛 …
<b>~</b>	Address	Mailing Address	Residential Address	Active
	1898 Spring Rd Se, 6G	Yes	Yes	Yes

8. Select Change Residential Address and the request to change address form will appear

Request To Change Residential Address For				
This request will be routed for approval. Please refra To track your pending requests, under Employee Space Effective Date *	in from submitting multiple requests. ce, click on 'My Actions'. Go to 'My Request Actions'. You sl	hould be able to see all your submitted actions here.		
Reason Q=				
Description Enter The Address Changes				
Cancel	Save As Draft	Submit		

9. You will need to specify the following information:

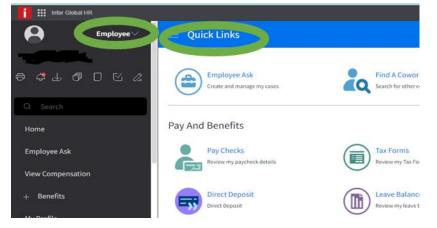
# Effective Date: Enter today's date Reason: Use the magnifying glass to select a reason

Request To Change Residential Address For							
Enter The Address Changes	Enter The Address Changes						
Please use Proper Case when entering the address d	letails.						
Country							
US Q= United States							
Street Address							
578 Dove St							
Apt 5G							
Cancel	Save As Draft	Submit					

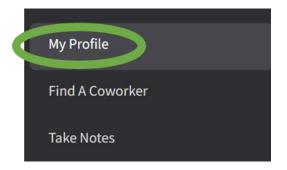
10. Click **Submit** and the request will be routed for approval and will not take immediate effect.

You will not see the change reflected in Infor until it has been approved.

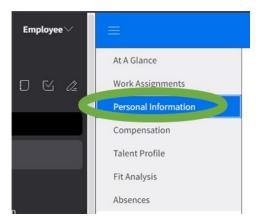
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from black menu on the left



4. Select Personal Information from your left Menu



- 5. Scroll down to Addresses section
- 6. Select Add PO Box Address

Addresses		Add PO Box Address		
	Address	Mailing Addr	Residential A	Active

7. The Request to Add Address form will appear

Request To Add PO Box Address For				
This request will be routed for approval. Please refrain from submitting multiple requests.				
To track your pending requests, under Employee Space, click on 'My Actions'. Go to 'My Request Actions'. You should be able to see all your submitted actions here.				
Effective Date				
Reason Q <sup>=</sup>				
If Address Is Temporary, Enter The End Date				
Description				
Cancel	Save As Draft	Submit		

- You will need to specify the following information:
   Effective Date: Enter today's date
   Reason: Use the magnifying glass to select ADDAddress
- 9. You will need to specify the following information:

Effective Date: Enter today's date Reason: Use the magnifying glass to select ADDADDRESS County/District: Enter "US" or use the magnifying class to select

10. After entering "US" the Street Address fields will populate. Please enter street address, city, state, and zip code

5treet Address
City
State/Province
Q=

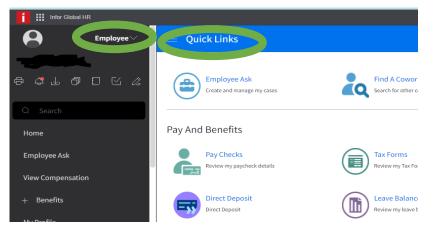
11. The check box beside Send Mail To This Address will be prepopulated

#### 12. Click Submit

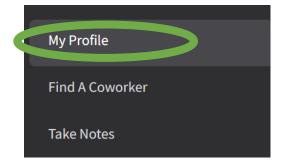
Once you have submitted the request to add your PO Box. You will be notified via an email that your address request has been approved and completed. You will then see the new address on your Profile in Infor.

# Change Your Name Request

- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



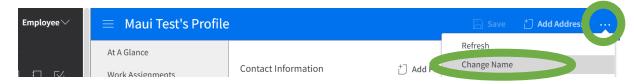
3. Select MyProfile from the black menu on the left



4. Select Personal Information from the left menu



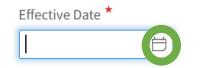
5. Select the All Actions menu and click on Change Name



6. The Request To Change Name form will appear

7. Enter and update your name change info into the fields

**Effective Date:** Enter date of name change goes into effect or use the calendar icon to select a date **\*If the change is a result of a court order, used the date of the document\*** 



Reason: Use the magnifying glass to select a Reason for submitting a name change request



Former Last Name: Enter your former last name in this field

Former Last Name *	

Attach Supporting Document: Use the folder icon to select a file from your computer

Attach Supporting Document



At least one of these legal documents to verify your new legal name change:

**Marriage Certificate** 

**Divorce Decree** 

**Updated Driver's License** 

Updated Professional License Updated US Passport Updated Birth Certificate Updated Social Security Card

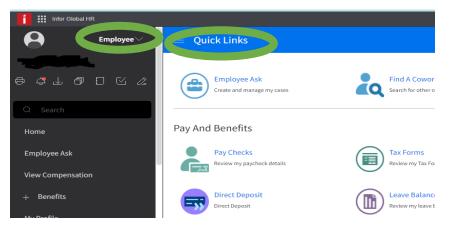
Remember, this is a **required** action above – if not attached to this form, it will not be approved and it will be returned to the employee for completion.

8. Submit

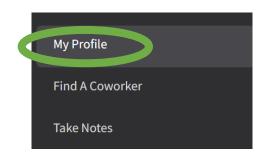
# **Revise a Pending Name-Change Request**

You have submitted a Name Change Request but now need to make some updates.

- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from the black menu on the left



4. You are taken to the At A Glance on the left menu



5. Click on Pending Name Changes



Dates & Service

6. The Requested Name Changes page will appear

Employee∨	$\equiv$ Requested Name Changes $\square = \square = \square \cdots$			
	-	Name	Effective Date	Status
		iTest, Maui	6/2/2022	Requested

7. Right click on the displayed name change request and select Open

Employee∨	$\equiv$ Requested	d Name Changes		
	<b>~</b>	Name	Effective Date	Status
		iTest, Maui	6/2/0	Requested
			Open	
			Refresh	
			Search	

#### 8. The **Change Name** form will appear

Change Name For Maui Test-902

Effective Date *		
6/2/2022		
Reason		
MARRIED	Q=	Married
Requested Name Change Title First Name		
First Name		
Cancel		Submit

9. You will need to specify the following information:

Effective Date: Adjust the effective date from initial request, if needed

Effective Date $\star$	
6/2/2022	Ë

Reason: Update the reason from the initial request, if needed

Reason		
MARRIED	Q=	Married

**Requested Name Change:** Update name information from the initial request, if needed **Marital Status:** Specify your new marital status, if this has changed

Marital Status	
Single	•

Former Name: Will appear from the initial request Attachment: Will appear from the initial request. You may delete and upload an updated legal document, if needed

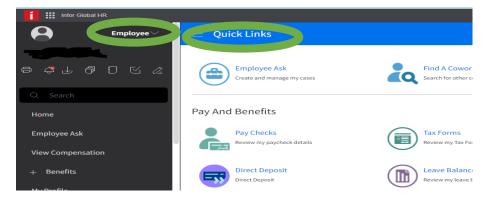
#### 10. Click Submit

#### The revised Requested Name Changes will now be displayed

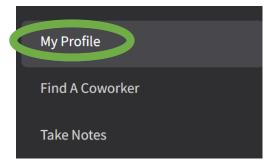
Employee 🗸	$\equiv$ Requested	quested Name Changes				
		Name	Effective Date	Status		
		iTest, Maui	6/3/2022	Requested		

### View Your Work Assignment History

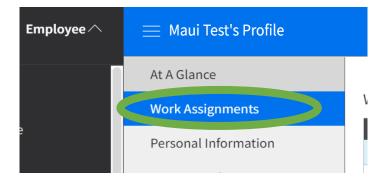
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from the black menu on the left



4. Select Work Assignments from your left menu



5. In the **Work Assignments** section, double click on the Work Assignment you wish to see

Employee 🔿	≡ Maui Test's Profile					B	Save
	At A Glance Work Assignments	Work Assignments				Print to File •••	
e	Personal information		Primary	Organization Unit	Position	My Direct Manager	My Dott
	Compensation		Yes	Respiratory			
	Tax Forms						

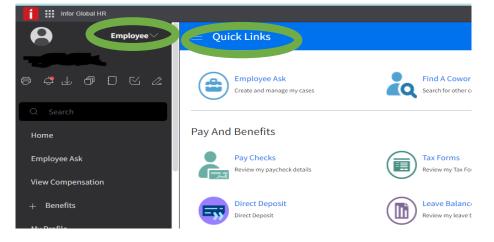
6. The Work Assignment Profile window will appear. Click on Position History from the left menu

Employee 🗸	😑 Maui Test's Wor	k Assignment Profile		< ⊳			
J 🗹 🖍	Overview Position History	Position History	,				
		Name           Test. Maui	Effective D 🗘	Position Title Registered Respiratory Therapist	Manager		
					20 🔻		

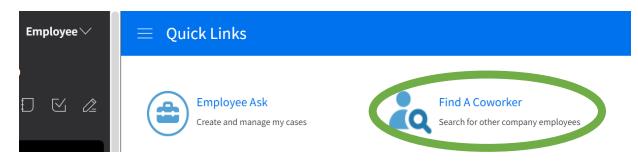
This will present you with a window listing the Work Assignment history in chronological order, with the current Work Assignment at the top of the list. To view any Work Assignment history record in more detail, double click that record.

#### Find a Coworker (Employee Directory)

- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



#### 3. Select Find A Coworker under Quick Links



4. The Search in Organization Directory page will display

Search In Organization Directory					ť ť	) <del>-</del> Q
Keyword           [A *]           Employment ID         Last Name           = *         [A] *	First Name					
Organization Unit Location	Position					Clear Search
	Work Phone	Organization Unit	Country	Location	Reports To	Reports To

5. To display a list of all employees in your organization Click Search



Available information might include the employees' work phone, Organization unit, Country, Location, and Supervisor's name and position.

Optionally, filter the list to a specific coworker or group of coworkers by specifying criteria in one or more fields, the click **Search** again.

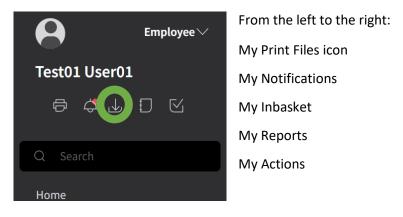
Optionally, click the link (if any) in the **Organization** column to view the **Organization Structure** page for that employee's business unit.

This page displays an alphabetical list of all employees in the organization, on which you can filter.

#### Viewing My Inbasket

As an employee you can check your Inbasket for any pending tasks

- 1. Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>
- 2. Click on **My Inbasket**



Click to check if you have any pending Tasks assigned to you. If you do have any pending Tasks listed, double click on the line to open and review.

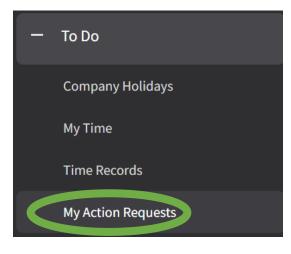
# Viewing My Action Requests

Employee can track their action requests that are pending and completed

- 1. Log into Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>
- 2. Scroll Down and select To Do from the black menu



3. Click the + sign to expand the menu and select My Action Requests



4. The My Action Requests page will appear

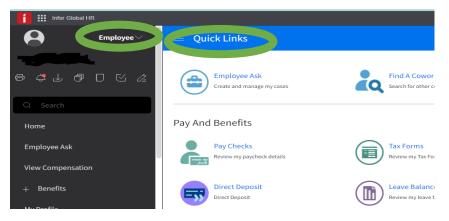


**Open tab:** Pending actions

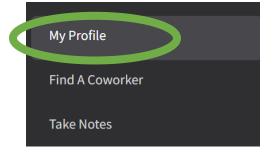
All tab: All actions including pending and completed

# Adding your Credential

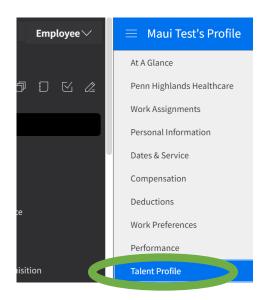
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select My Profile from the black menu on the left



4. Select Talent Profile from the left menu



5. Click the **Create** on the **Credential** Panel

Credenti	(i	<sup>+</sup> ] Create			
	Competency 🖨	Essential	Rating	Validated	Created From

6. The Add Credential form will appear

Add Credential					
Effective Date					
Reason					
	Q=				
Either Select Credential Or En	ter Other				
Credential					
	Q=				
Region					
Cancel	Submit				

7. You will need to specify the following information

**Effective Date:** Enter today's date or use the calendar icon to select a date **Reason**: Use the magnifying glass to select a reason



Select 'Reason'					
Action Reasons		$\overline{=}$ $\bigcirc$			
Action Reason	Description [A] ▼	Subject			
NEW LICENSE	ew License/Credential	HCMActionRequestQualification			

Credential: Use the magnifying glass to select the applicable credential name

Credential	
	Q=

Credential Number: Add a Credential number Original Credential Date: Enter the first Credential date Expiration Date: Add an expiration date for credential Attachment: Use the folder icon to select a file for your computer \* Description will populate with the file name\*

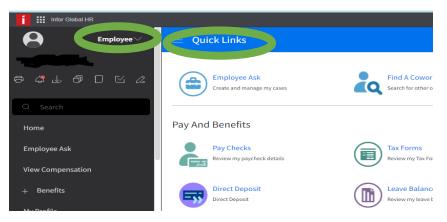
8. Click the Submit

The credential is added, and not validated. It is now available to the Manager and HR for validation.

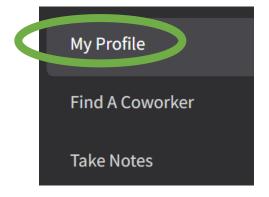
# Updating your Credential

Changes can be made to Credentials that have not been validated by HR yet. This option can be used if you notice any incorrect information you may have submitted when adding your credential.

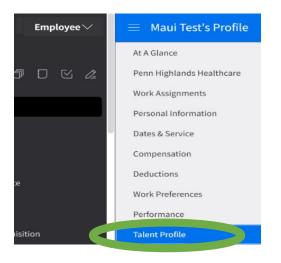
- 1. Log in to GHR: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Scroll down the left-side menu and select My Profile



4. Select Talent Profile from the black menu



5. Check the box beside the Credential you wish to update and click on it to highlight blue

Credentials						ate …
	Credential ≑	Source	Essential	Expiratio	Vali	Compl
	ADV CARDIAC LIFE SUPPORT			5/31/2023	No	No
	REGISTERED NURSE			4/30/	No	No

6. Select the All actions menu and click Change

Crede	ntials		<sup>†</sup> ] Create …
	Credential ≑	Sc	Open
	ADV CARDIAC LIFE SUPPORT		Search
	REGISTERED NURSE		
			Change
			Create Notifications For Expiring Credentials

7. You will need to specify the following information

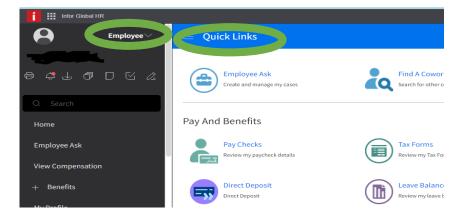
Effective Date: Update effective date, if needed Credential Number: Update Credential number, if needed Most Recent Renewal: Update date, if needed Expiration Date: Update the expiration date, if needed File Name: Update, if need

8. Click the **Submit**.

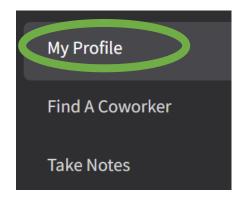
# **Renewing Credentials**

Only Credentials that have been validated by HR can be requested for renewel.

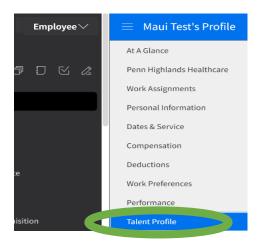
- 1. Log in to GHR
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Scroll down the left-side menu and select My Profile



4. Select Talent Profile from the black menu



5. Check the box beside the Credential you wish to renew and click on it to highlight blue

Credentials				† ⊂Create	🗔 Requ	iest To Ren	ew
	-	Credential 🚔	Source	Essential	Expiratio	Vali	Compl
		ADV CARDIAC LIFE SUPPORT			5/31/2023	Yes	No

#### 6. Select Request to Renew

Credentials				<sup>+</sup> Create	Requ	iest To Ren	ew
	-	Credential 🚔	Source	Essential	Expiratio	Vali	Compl
		ADV CARDIAC LIFE SUPPORT			5/31/2023	Yes	No

- 7. The Credental Request from will appear
- 8. You will need to specify the following information:

**Request Next Renewal Date:** Enter the new renewal date **Requested Next Expiration Date**: Enter the new expiration date

9. Click Submit

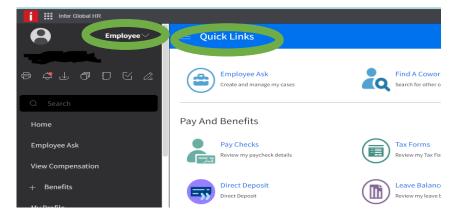
Note: As your Credential renewal is pending, a symbol will appear by that requested credential

Credentials					†] Crea	🕆 Create \cdots	
	Credential ≑	Source	Essential	Expiratio	Vali	Compl	
	ADV CARDIAC LIFE SUPPORT			▲ 5/31/20	Yes	No	

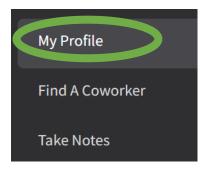
### **Cancel Request to Renew**

1. Log in to GHR: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>

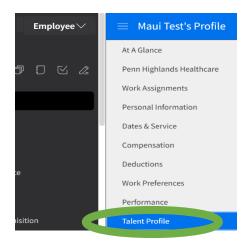
2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Scroll down the left-side menu and select My Profile



4. Select Talent Profile from the black menu



5. Check the box beside the **Credential** you wish to cancel request for and click on it to highlight blue

tio Vali	Compl
023 Yes	No

6. Select the All Actions menu

Credentials			<sup>+</sup> ] Create			ew 😶
=	Credential ≑	Source	Essential	Expiratio	Vali	Compl
	ADV CARDIAC LIFE SUPPORT			5/31/2023	Yes	No

### 7. Select Cancel Request To Renew

Crede	ntials		<sup>+</sup> Create	C Request To Renew
-	Credential 🚔	Sc	Open	
	ADV CARDIAC LIFE SUPPORT		Search	
	REGISTERED NURSE		ocuren	
			Cancel Request To	Renew
			Change	

- 8. The Cancel Request form will appear
- 9. Enter the effective date and click Submit

# Case Management

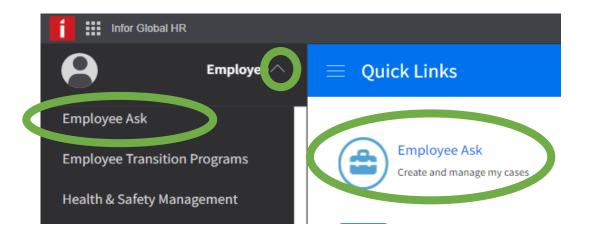
# What is Case Management?

Infor **Case Management** helps efficiently manage and track your inquiries, provides you with a self-service portal, and helps answer some of those frequently asked questions, *quickly!* Using the **Quick Case** feature. Topics include HR-related questions, Benefits questions, Payroll questions, and more, without needing to log in to your email!

We recommend an employee log in to Infor on their own, and submit an **Employee Ask**; utilizing the self-service tools available and to allow for a prompter response to be available directly to you. As well as a history of your cases, or "Asks" and their resolution and responses.

# **Employee Ask**

- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD
- 2. Select "Employee Ask" from your left, black bar menu or use the Employee Ask on your Quick Links



- Select Create Specify the following information on the Details tab: Topic: Select a topic Subject: Type the subject of the case Issue: Explain, in detail, the issue
- 4. Click Submit

# Quick Case Feature

You also have the option of using the Quick Case feature by selecting a Quick Case from the options available to you in the Quick Case field. To use, select the Quick Case field instead of completing Step 4, above. This has a list of some frequently asked questions and their responses, available immediately to you upon submission.

Example of Quick Case questions:

Case	e 0				_
loyee	Select	t 'Quick Case'			
en			ť	= Q	
Cas	=	Description		Classification	
*		Direct Deposit Update			
		How do I request a new/additional ins	surance card?		
ct *		I'm retiring, what are my next steps?			
		My employment with PHH is ending, v	vhat are my next steps?		
e -		Access/ID badge isn't working			
		What is a "Life Event"			
		Setting Up my Virgin Pulse MyWellBei	ng Account		
me				10 🔻	
ime		Cancel	Ok		

Quick Cases will have a response, available once you have submitted it. You will need to view the Notes and Attachments of that case.

al HR			Q Start Typing	
Employee Ask $arsigma$	📃 Employee Ask			
ell	Active Cases Archived Cases			
Ð D K 🖉	Create ••	etails Notes and Attachments		
	Q Keyword	Conc. 1010		
	1010	Case 1010	Note	Add
	Open How do I request a new/additional insurance card? 12/21/2021 3:41:50 PM	Туре	Please visit the carrier website, mobile app, or call the carrier directly to request a new card. Y will have to provide verification of identificatio such as birthdate and SSN. Visiting the carrier website directly will allow ye	n,
		21 3.41.30 PM	to download and print your card. Using the mobile app you will be able to save your ID card to your phone's wallet.	

#### What to expect next?

When you submit an **Employee Ask** you will find any notes and attachments that you provided or that the Case Agent (person providing response) under the **Notes and Attachments** tab of your active case – see example below.

Employee 🗸	$\equiv~$ Employee Asl	<		
	Active Cases Archiv	ved Cases		
		Create	Details Notes and Attachments	
	Q Keyword 1159 Closed Holiday Schedule 6/3/2022 9:38:02 AM	Ŧ	Case 1159           Type         Note           Resolution         Provided the holiday schedule for 2022.	Add
	1160 Open How do I request a new/		Please see the holiday scheduled attached.	Holiday Schedule 2022.docx

You will also be notified once your case is resolved – meaning that response is provided and the case is marked "Closed." You will also receive email notifications that correspond with the Infor notifications throughout this process, for your convenience.

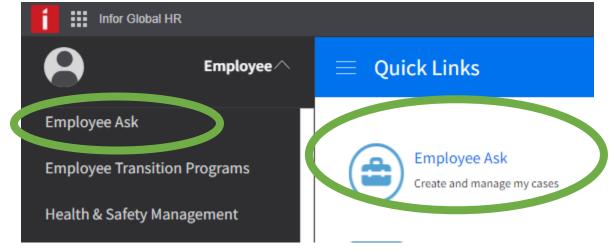
The **Notes and Attachments** tab updates to reflect any notes, responses, attachments, status updates, and any closing and resolution information and reason.

# Case Management FAQ

What if I found my answer before I actually received response and resolution?

# Then please simply Close the case (Employee Ask)

- 1. Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</u>
- 2. Select "Employee Ask" from your left, black bar menu or use the Employee Ask on your Quick Links

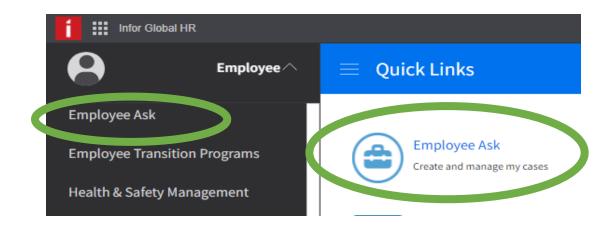


- 3. Select Active Cases
- 4. Select the desired case by double-clicking > click **Close Case** and you will be prompted to then enter the Resolution (notes as to why you're closing this case, i.e. "found my answer" or "no longer necessary")
- 5. Click Submit

### What if I need to Reopen\* a Case that's been closed?

\*The Reopen action can only be completed within 14 days of a case being closed. After 14 days, please create a new case.

- 1. Login to Infor: <a href="https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD">https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE\_PRD</a>
- 2. Select "Employee Ask" from your left, black bar menu or use the Employee Ask on your Quick Links



- 3. Select Active Cases
- 4. Select the desired case by double-clicking > click **Reopen Case** and you will be prompted to then enter the Reopen **Reason** (notes as to why you're reopening this case)
- 5. Click Submit

The Notes and Attachments tab updates to reflect the reopening reason and the status updates to pending review.