Infor Employee Resource Guide

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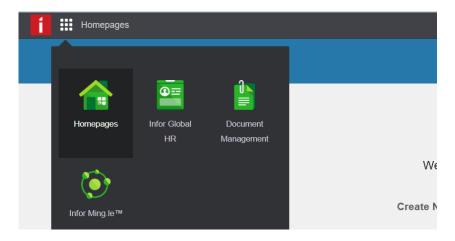
Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD</u> using your Chrome browser. Enter your Infor credentials provided to you in the "USERNAME" and PASSWORD" fields.

	infor
USERNAME	
PASSWORD	
	Sign On
	Forgot Password I Contact Us

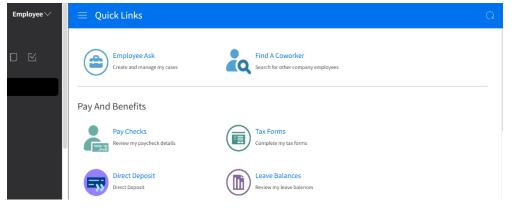
The first thing you will see is the home page. To get to Infor GHR, click the **Homepages** icon.

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.



Then the Employee Space will appear

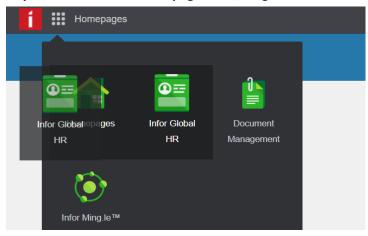


Rearrange Homepages Icons

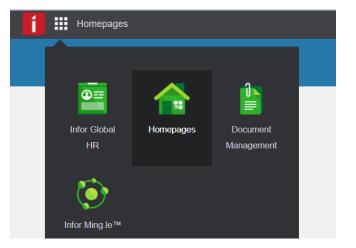
1. Click on Homepages icon

mepages	Q Start Typing	
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

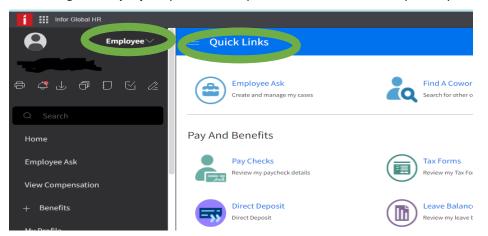
Employee∨	\equiv Quick Links		Q
	Employee Ask Create and manage my cases	Find A Coworker Search for other company employees	
	Pay And Benefits		
	Pay Checks Review my paycheck details	Tax Forms Complete my tax forms	
	Direct Deposit Direct Deposit	Leave Balances Review my leave balences	

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 \checkmark	\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	3			Q	
	Pay Checks Bar	nk Details Compensation				
	Compensation By	Work 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 Checks							
Pay Checks	Bank Details	Compensation					
Bank Details			t Add	🖉 Update Bank Account	⊘ Change Ord	ler	
Bank			Routing Number	Account Number	Flat Amount	Perc	cent

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

Add Bank Details			
Authorization I authorize for Penn Highlands to direct deposit my checks to my specified banks. *Note: If f against the account(s) to recover/remove the funds.	unds are direct deposited to your account(s) in error, PH may initiate a debit transaction		
Agree			
formed	Submit		
Cancel	SUDMIT		

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	ΞQ	•••		
Routing Number = • 1140049!	Pescription				
11000138	BANK OF AMERICA				
11001234	MELLON TRUST OF NEW ENG	LAND, N.A.			
11201458	CAMDEN NATIONAL BANK				
11400495	Bank of America				
	$ \langle \diamond \diamond \rangle \rangle $	1	L0 🔻		

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

Routing Number		
11400495	Q=	Bank of America

*If your 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

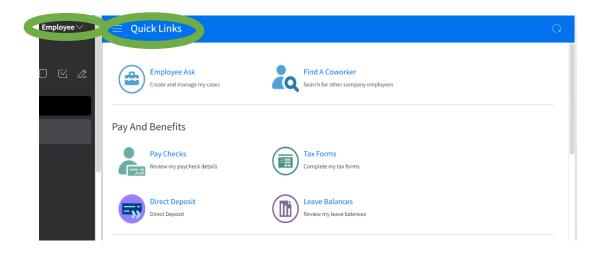


All other fields are optional

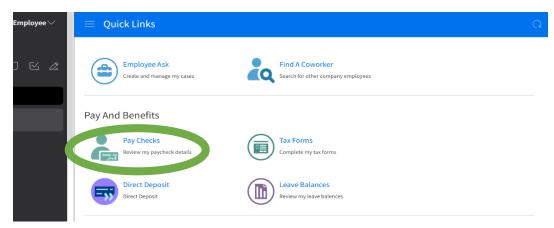
10. Select Submit

Update Direct Deposit information

- 1. Login to Infor: <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 **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

\equiv Pay Che	ecks			Q
Pay Checks	Bank Details	Compensation		
Bank Details			📩 Add 🔣 Update Bank Account 🔗 Chang	e Order 🛛 \cdots
Bank			Routing Number Account Number Flat Amount	Percent

7. The Change Bank Details form will display

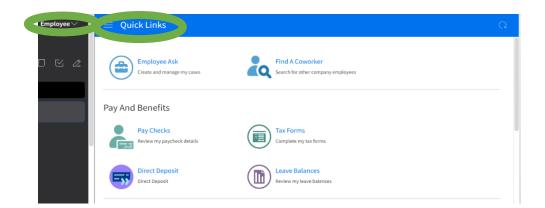
Update the banking information as desired (Routing Number, Account Number, and Account Type etc.) Update **Begin Date** (Use today's date or a future date)

*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)

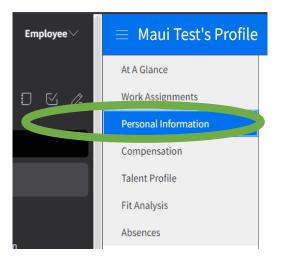
- 1. Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD</u>
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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

My Profile
Find A Coworker
Take Notes

4. Select Personal Information from your left menu



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

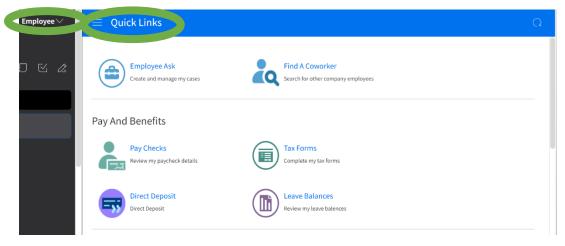
Emergency Contacts		Add Contact Delete			
	Name	Preferred Contact	Contact Detail		

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)

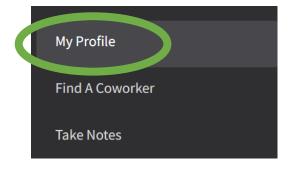
8. Select Submit

Update your Emergency Contact Information

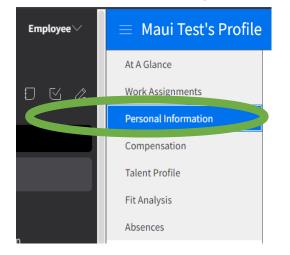
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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

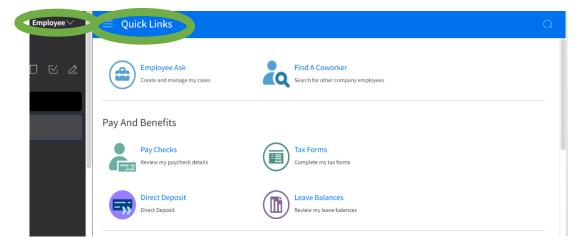
6. Double click on the emergency contact information you want to update

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

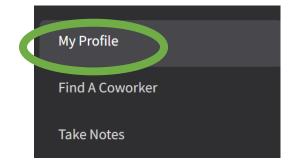
- 7. The Change Emergency Contact form will appear
- 8. Enter today's date as the Effective Date
- 9. Enter the updated contact information and click Submit

Delete Emergency Contact Information

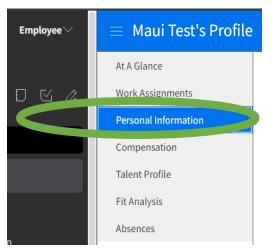
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



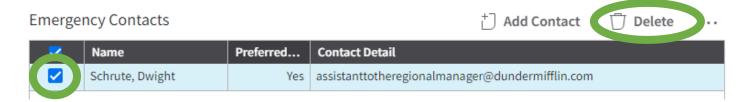
3. Select Edit My Profile from the Quick Links in your Employee Space



4. Select Personal Information from your left menu

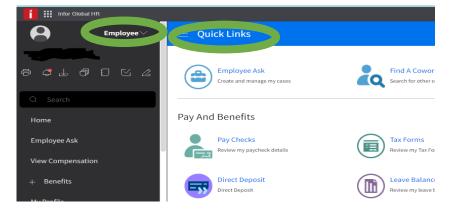


- 5. Scroll down to the Emergency Contacts section
- 6. Check the box beside that contact, click on their name to highlight them blue and then select **Delete**.

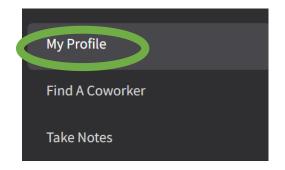


Add Your Contact Information (Work Phone, Personal Phone, etc.)

- 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 🗸	📒 Maui Test's Profile	📄 Save 📩 Add Address \cdots
	At A Glance	Maui Test - 190-75000-10871-01
	Work Assignments Personal Information	

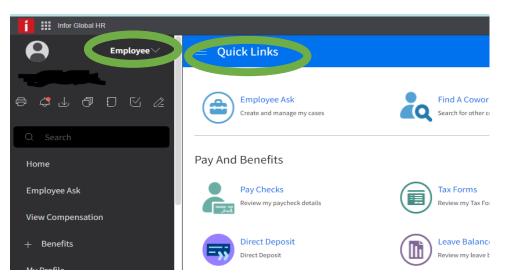
5. Select Add Phone or Add Email in the Contact information section to add a new contact

Contact Information		Add Phone Add Email			
Method	Detail	Prefer	When Ava	Country	Active

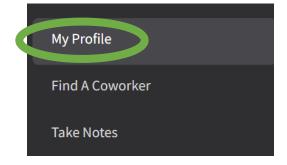
- Enter today's date as the Effective Date, enter your new contact information. Ensure that if entering a
 Telephone Type it matches the information fields you've completed. (Phone Country Code always = 1 in the US)
- 7. Click Submit

Change Your Contact Information

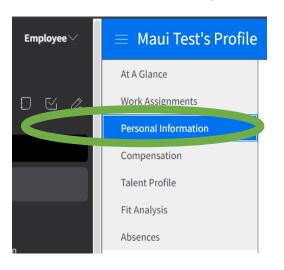
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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

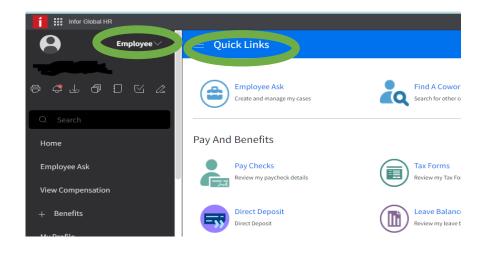
Update Email

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

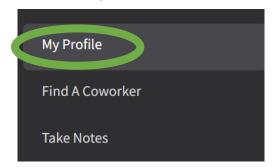
- 7. Enter today's date as the Effective Date
- 8. Enter your updated contact information and click Submit

Add Your Address

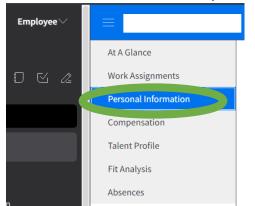
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



3. Select Edit My Profile from the Quick Links in your Employee Space



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



- 5. Scroll down to the Addresses section
- 6. Select Add Address to add a new or additional address

Addresses			C Add Address ····	
	Address	Mailing Address	Residential Address Active	

7. You will need to specify the following information on the Details tab:

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

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

Street Address
City
State/Province
Q=

9. Check at least 1 of these boxes

County/District

Send Mail To This Address

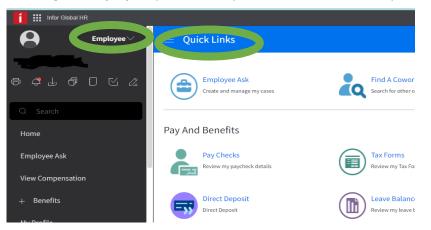
🗌 I Live At This Address

Comment

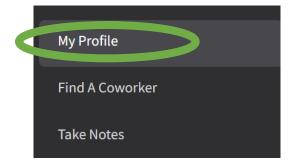
10. Click Submit

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

Administrator \checkmark		📄 Save
bb	Request To Change Name Fo	r Maui Test-902
	Q [≅] Enter The Changes Title First Name	
ition	Cancel	Submit

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***

Effective Date	*
Reason: Use the magnifying glass to select a	Reason for submitting a name change request
Reason	्
Former Last Name: Enter your former last n	ame in this field
Former Last Name *	
Attach Supporting Document: Use the folde	r 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

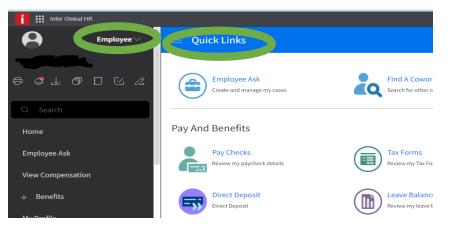
Remember, this is a **required** action above – if not attached to this form, it will not be approved and it will be returned to the employee for completion.

8. Submit

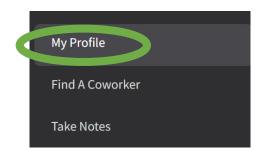
Revise a Pending Name-Change Request

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 MyProfile 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	\equiv Requested Name Changes $\square \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $				
	-	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		
	~	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		
Cancel		Submit

9. You will need to specify the following information:

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

Effective Date *	
6/2/2022	Ħ

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

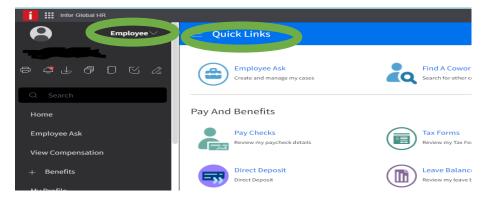
10. Click Submit

The revised Requested Name Changes will now be displayed

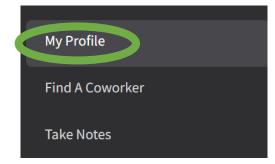
\equiv Requested Name Changes			
	Name	Effective Date	Status
	iTest, Maui	6/3/2022	Requested
	■ Requeste	Name	Name Effective Date

View Your Work Assignment History

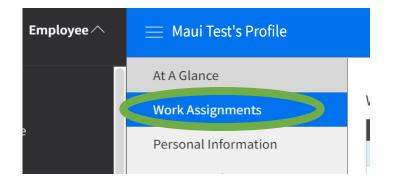
- 1. Login to Infor: https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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 🔿	\equiv Maui Test's Profile					B	Save
	At A Glance	Work	Assignment	c		Drintto	File
	Work Assignments	Work Assignments				Print to File 🛛 \cdots	
e	Personal Information		Primary	Organization Unit	Position	My Direct Manager	My Dott
	Personal Information		Yes	Respiratory			
	Compensation						
	Tax Forms						

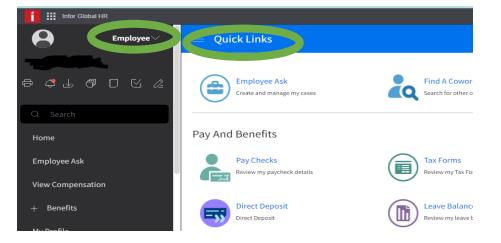
6. The Work Assignment Profile window will appear. Click on Position History from the left menu

Employee 🗸	😑 Maui Test's Wor	k Assignm	ΒΰΩ				
J 🗹 🖍	Overview Position History						
			Name Test Maui	Effective D ↓ 1/19/2022	Position Title Registered Respiratory Therapist	Manager	
						20	•

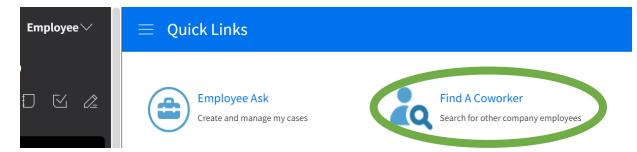
This will present you with a window listing the Work Assignment history in chronological order, with the current Work Assignment at the top of the list. To view any Work Assignment history record in more detail, double click that record.

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 (†) , Q
Keyword [A • [Employment ID Last Name = • [[A] • [Organization Unit Location [A •] [A •]	First Name [ʎ] ▼	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.

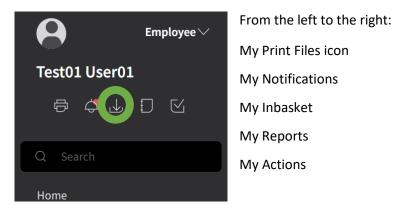
This page displays an alphabetical list of all employees in the organization, on which you can filter.

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 **MyInbasket**



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.

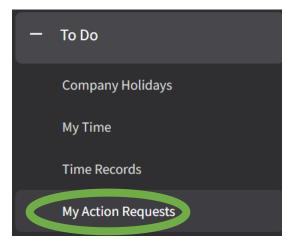
Viewing My Action Requests

Employee can track their action requests that are pending and completed

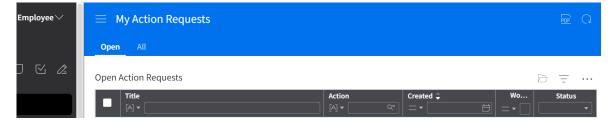
- 1. Log into Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD</u>
- 2. Scroll Down and select To Do from the black menu



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



4. The My Action Requests page will appear

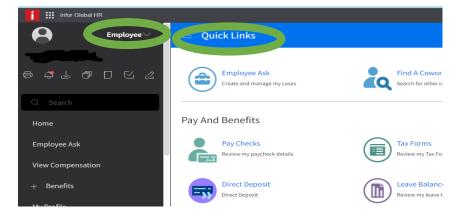


Open tab: Pending actions

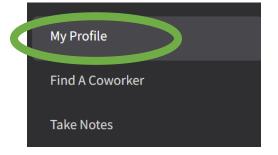
All tab: All actions including pending and completed

Adding your Credential

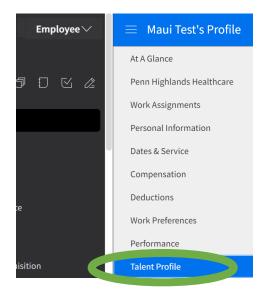
- 1. Login to Infor: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD</u>
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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



4. Select Talent Profile from the left menu



5. Click the Create on the Credential Panel

Credentials	5		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		
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

Reason		Q=
Select 'Rea	ason'	×
Action Reasons	;	$=$ \bigcirc
Action Reason	Description [A] ▼	Subject [A] ▼
NEW LICENSE	ew License/Credential	HCMActionRequestQualification

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

Credential	
	QŦ

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*

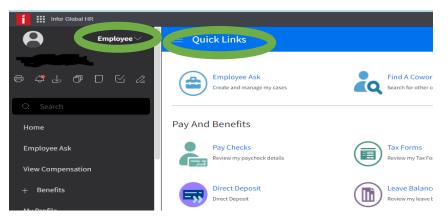
8. Click the Submit

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

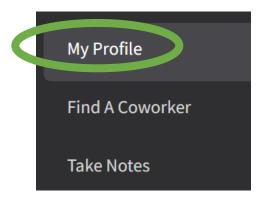
Updating your Credential

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.

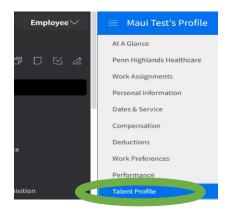
- 1. Log in to GHR: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD</u>
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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

=	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		🖞 Create 🔐
	Credential 🔷	Sc	Open
	ADV CARDIAC LIFE SUPPORT		Search
	REGISTERED NURSE	_	Scarch
	·		Change
		_	Create Notifications For Expiring Credentials

7. You will need to specify the following information

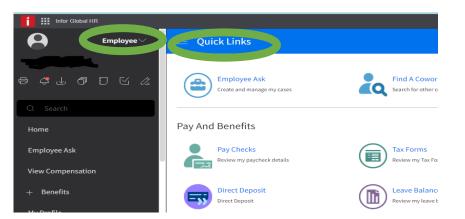
Effective Date: Update effective date, if needed Credential Number: Update Credential number, if needed Most Recent Renewal: Update date, if needed Expiration Date: Update the expiration date, if needed File Name: Update, if need

8. Click the Submit.

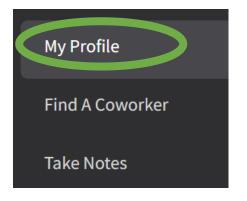
Renewing Credentials

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

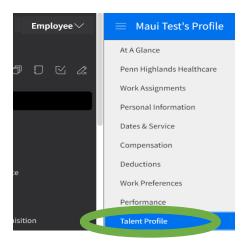
- 1. Log in to GHR
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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 C Request To Renew . . . Credential ≑ Source Essential Expiratio... Vali... Compl... -ADV CARDIAC LIFE SUPPORT \checkmark 5/31/2023 Yes No

6. Select Request to Renew

Credential SourceEssentialExpiratioValiComplADV CARDIAC LIFE SUPPORTImage: Source5/31/2023YesNo	Creder	ntials		⁺ ☐ Create C□ Request To Renew ···				
ADV CARDIAC LIFE SUPPORT 5/31/2023 Yes No	=	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

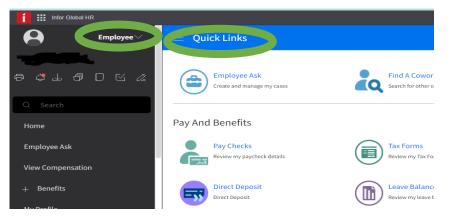
9. Click Submit

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

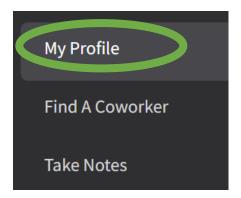
Crede	†] Crea	ate …				
	Credential ≑	Source	Essential	Expiratio	Vali	Compl
	ADV CARDIAC LIFE SUPPORT			▲ 5/31/20	Yes	No

Cancel Request to Renew

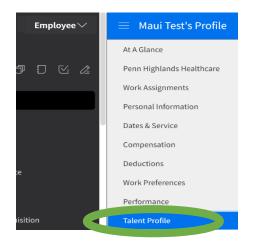
- 1. Log in to GHR: <u>https://mingle-portal.inforcloudsuite.com/PHHEALTHCARE_PRD</u>
- 2. Ensure you're viewing the Employee space. Most options are available directly from your Quick Links



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

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

6. Select the All Actions menu

Credentials ⁺ Crea	📩 Create 🛛 🗔 Request To Renew			
E Credential 🕈 Source Essenti	tial Expiratio Vali	Compl		
ADV CARDIAC LIFE SUPPORT	5/31/2023 Yes	No		

7. Select Cancel Request To Renew

Credentials			† Create □ Request To Renew
	Credential 🔷	Sc	Open
	ADV CARDIAC LIFE SUPPORT		Search
	REGISTERED NURSE		
			Cancel Request To Renew
			Change

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

Case Management

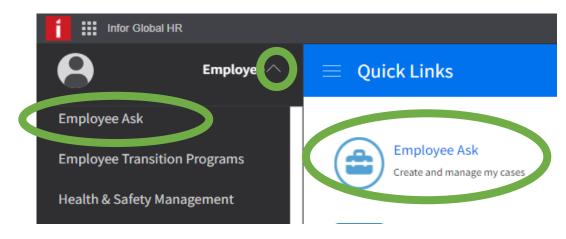
What is Case Management?

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 0							
Se	lect	'Quick Case'					
s			ť	$\equiv \Omega \cdots$			
	-	Description [A] ▼		Classification			
		Direct Deposit Update					
	4	How do I request a new/additional ins	surance card?				
* 0		I'm retiring, what are my next steps?					
		My employment with PHH is ending, v	what are my next steps?				
		Access/ID badge isn't working					
		What is a "Life Event"					
		Setting Up my Virgin Pulse MyWellBei	ng Account				
ne				10 🔻			
	Cancel Ok						
me							

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 $arsigma$	😑 Employe	ee Ask								
	ell	Active Cases	Archived Cases		0						
	đ D ⊻ ⊿		Create		etails	Notes and Attachments					
		Q Keyword		Ŧ	Case 1010					Add	
		1010			Case 1010	,	Туре	Note	,	Add Att	
		Open How do I request a new/additional insurance card? 12/21/2021 3:41:50 PM					Please visit the carrier website, mobi call the carrier directly to request a n will have to provide verification of ide such as birthdate and SSN.	ew card. You			
			[Ð	21 3:41:5	SO PM		Visiting the carrier website directly w	vill allow you		
				rin			to download and print your card. Using the mobile app you will be able your ID card to your phone's wallet.	e to save			

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 \checkmark	\equiv Employee Ask			
	Active Cases Archived	d Cases		
		Create	Detail Notes and Attachments	
	Q Keyword	Ŧ	Com 1170	
	1159 Closed Holiday Schedule 6/3/2022 9:38:02 AM	-	Case 1159 Type Note Resolution Provided the holiday schedule for 2022.	Add
	E 1160 Open How do Leguest a new/additional		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.

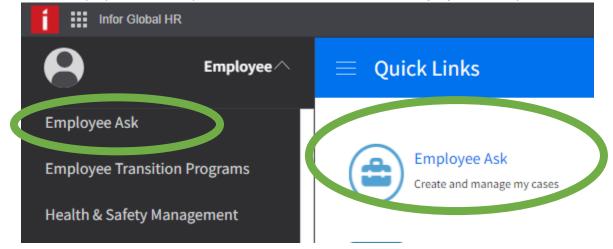
The **Notes and Attachments** tab updates to reflect any notes, responses, attachments, status updates, and any closing and resolution information and reason.

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

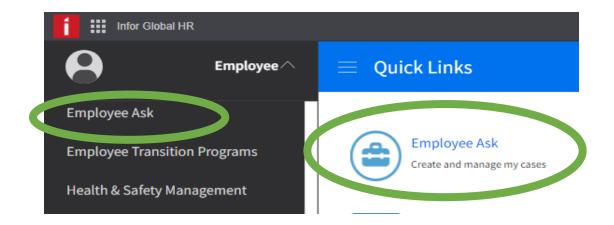


- 3. Select Active Cases
- 4. Select the desired case by double-clicking > click **Close Case** and you will be prompted to then enter the Resolution (notes as to why you're closing this case, i.e. "found my answer" or "no longer necessary")
- 5. Click Submit

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: <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 **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.