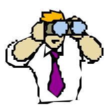
Lesson 2: Third Party

Description: **Sometimes, a third party contact will initiate a case on behalf of the customer (borrower). This third party contact could be the borrower's parent, spouse, etc. For this scenario, you will follow the same steps as in Lesson 2 to create the case, contact record, and account record for the *customer*; however, in addition to this, you will also create a contact record for the third party.**

The contact record for the borrower and the contact record for the third party will both be listed under the customer's account record. At the end of this lesson, you will pick the third party contact as the primary contact for this case.



Take Note

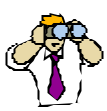
Remember, all required fields must be populated. If you do not have information for a required field, you must enter "Not Given" into the field.

1. *Go to* the Cases Screen, All Cases View.
   You will now create a new case for a new customer, as initiated by the third party contact.

2. *Click* the **New** button on the form applet at the bottom of the screen.
   This creates a new case record. The Case # field will populate with a system-generated number.

3. *Enter* the ***Original Issue Summary***.
   This is a large free-form text field in which you should describe the root cause of the case in detail.

4. *Advance* to the next field by pressing the **Tab** key on your keyboard.
   This will automatically take you to the ***Original Issue Category*** field.



Take Note

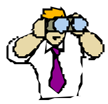
In OCTS 2.0, when you are finished entering information into a field, *press* the **Tab** key to advance to the next field. In this guide, there will not be a step outlined between each field—the guide assumes that you will press **Tab** to advance between each field.

5. *Press* **F2** to select the ***Original Issue Category.***
   Or, *Click* the **drop-down arrow** button with your mouse.
   You will select the root cause of this case from the picklist that appears. If you know the first letter of the desired value, *enter* that letter on your keyboard.

6. *Use* the up and down arrow buttons on your keyboard to navigate up and down the picklist.
   Or, *use* your mouse to scroll up and down the list.

7. *Ensure* that the desired picklist value is highlighted in blue.

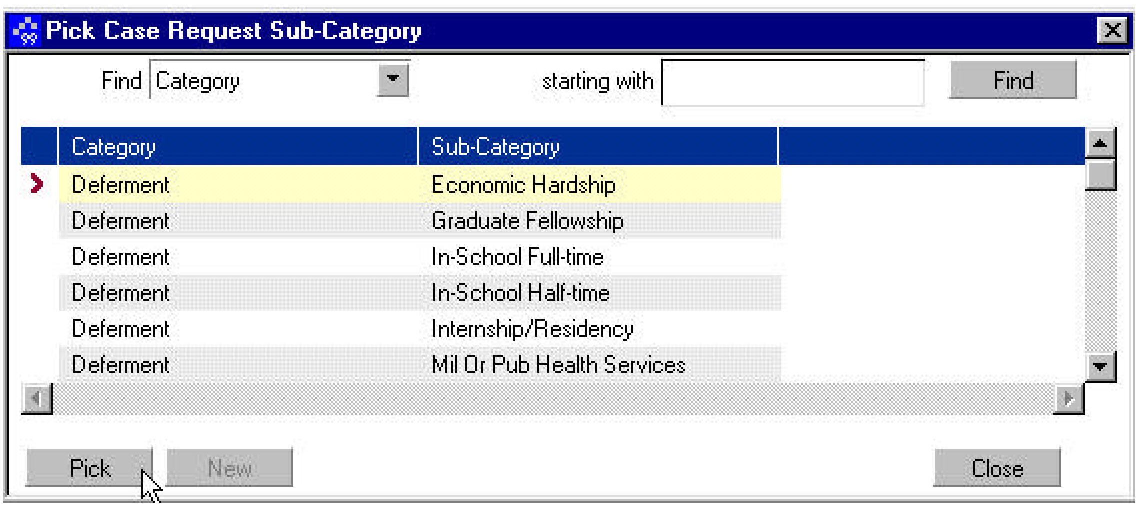
8. *Press* Enter on your keyboard to select that value.
   Or, *Click* once on the desired value with your mouse.



Take Note

If you **do not** see the Original Issue Category that you need for this case, you should select "Other." However, before you select "Other," make sure that you have thoroughly reviewed all values in the picklist. This is important for efficiently organizing all case information in the Knowledge Base.

9. *Press* **F2** in the ***Original Issue Sub Category*** field.
   This will bring up the Pick Case Request Sub-Category Box (shown below). The available Sub Category choices correspond to the Category that you have just selected.



10. *Select* the desired Category and Sub Category combination by using the up and down arrows on your keyboard.
    Or, *Click* your mouse to the left of the desired record so that the red arrow is pointing to it.

11. *Press* **Enter** on your keyboard.
    Or, *Click* the **Pick** button.
    Your selection has now been populated in the Sub Category field.

12. *Fill out* the following fields:

    - Customer Expectation Summary
      This is a large free-form text field in which you should enter the details of what the customer expects as the outcome of the case.

    - Customer Expectation Category

Press **F2** and select the result that the customer expects as you did for Original Issue Category.

- Customer Expectation Sub Category
  Press **F2** and select the sub category.

  - ***Referred By***

  Select a value from the picklist.

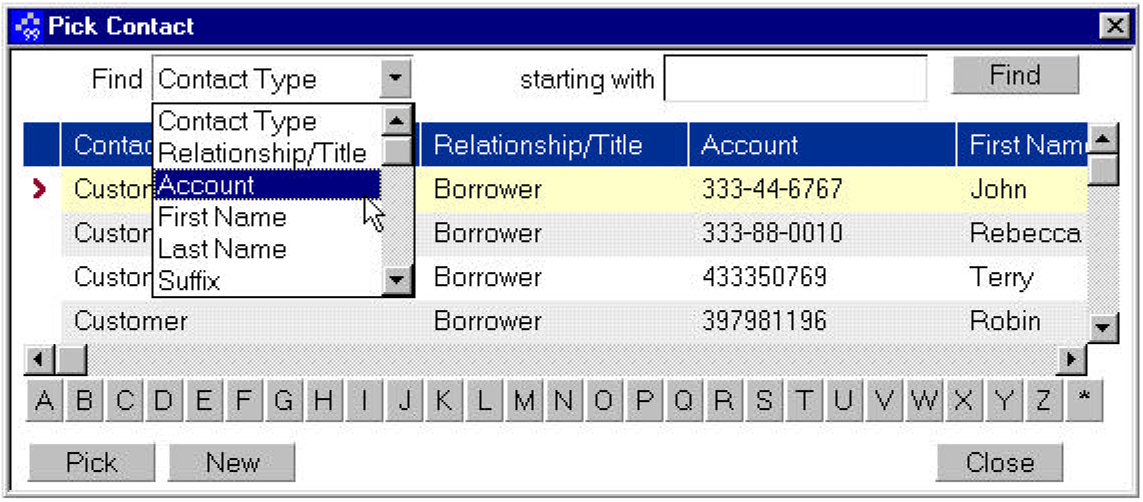
At this point in the procedure of opening a case, you have identified the primary issue of the case as well as what the customer/third party expects the outcome of this case to be**. Now you must gather profile information about the customer. You will enter profile information about the third party *after* you enter the information for the customer.** By following the steps below, you will create a **contact record and an account record for this customer**.

13. *Tab* to the Last Name field**.**

14. *Press* **F2**.
    Or *Click* the **drop-down arrow** button in the Last Name field.
    This begins the process of gathering profile information. The Pick Contact Box appears.

The Pick Contact Box contains all contacts that currently exist in OCTS 2.0—it is the same list that resides in the Contacts Screen. Before you enter this customer into OCTS 2.0, you must make sure that he or she does not already exist in the system. This will eliminate duplicate entries. You will use the search fields at the top of the Pick Contact Box to search for the borrower's SSN in the Account field.

15. *Select* **Account** from the picklist in the **Find** field (shown below).



16. *Click* in the **starting with** field.

17. *Enter* the entire SSN of the borrower with dashes in the **starting with** field (e.g. 123-45-6789).

18. *Press* the **Enter** key on your keyboard.
    Or *Click* the **Find** button.

The most common outcome is that no records will exist, indicating to you that this customer does not exist in the system. You will then add this customer to OCTS 2.0 by creating a contact record and an account record for this customer. Make sure to follow the steps carefully under Outcome #3.

There are two other possible outcomes that will not be common, but they are outlined below under Outcome #1 and #2.

<u>Possible Outcome #1—The Customer Already Exists in the System</u>

If this customer opened and closed a case in OCTS 2.0 in the past, his or her contact record will automatically populate the First Name, Last Name, Account, and Home Phone fields in the Cases applet where you began. *Press* **F2** in the Last Name field. *Proceed* to Step 27.

<u>Possible Outcome #2—Another Customer Is Automatically Selected in Error</u>

If there is a customer in the system that fit the SSN that you entered, OCTS 2.0 **will automatically select this contact** (this would only happen if you typed the SSN incorrectly). This will close the Pick Contact Box and take you back to the form applet on the Cases Screen, All Cases View where you began. If the contact that has been selected is **incorrect**, you must follow these steps:

- *Delete* the account number in the Account field in the Cases applet.
- *Click* the **drop-down arrow** button in the **Last Name** field.
- *Proceed* to step 19.

<u>Possible Outcome #3—Customer Does Not Exist in the System; No Records Are Found</u>

If no records are found, the record list will be blank, and you will follow the steps outlined below to enter the new contact and account information for this customer.

The Pick Contact Box should be open at this point. You will create a new contact record for this customer. Within this record, you will create a new account record for this customer. You will only enter the demographic information **once**—the information will be copied automatically from the account record to the contact record. Follow the steps below carefully.

Take Note

Remember to press the **Tab** key to advance to each field on the record. Press F2 on your keyboard when your cursor is in a field with a **drop-down arrow** button.

19. *Click* the **New** button at the bottom of the Pick Contact Box.
    This creates a blank contact record for this customer.

20. *Enter* the following information about the **customer contact**:

    - ***Contact Type***
      Because you are now entering the contact record for the customer, this value will be "Customer."

    - ***Relationship/Title***
      Because you are entering the contact record for the customer, this value will be "Borrower."

21. *Tab* to the Account field.

You have started to enter the contact information for this customer. You will now bring up the Pick Account Box within the Account field. The Pick Account Box contains all accounts in OCTS 2.0—the same list of accounts that reside in the Accounts Screen. From this box, you will create an account record for this customer. The account demographic information will automatically populate the contact record when you pick this account. Follow the steps below.

22. *Press* the **F2** key on your keyboard in the **Account** field.
    The Pick Account Box will appear.

Take Note

Notice that the Pick Account Box has the search fields like the Pick Contact Box. Because you have already searched for this customer using the Pick Contact Box, you do not have to search for this customer again.

23. *Click* the **New** button at the bottom of the Pick Account Box.
    This will create a blank record in which **you will enter the account information for this customer**.

24. *Enter* the following information about the **customer**:
    Reminder: *Press* the **Tab** key to move across the row. Press **F2** when there is a **drop-down arrow** indicating a list of values.

Take Note

If the customer does not provide required information, you must enter "Not Given" into the field. OCTS 2.0 will not allow you to proceed if you do not populate a required field.

- ***Account***
  This is the customer's (borrower's) SSN. You do not have to enter dashes—the SSN will be automatically formatted when you populate the next two fields.

- ***Account Type***
  This will always be **"**Customer" when you are creating an account for a new case.

- ***First Name*** (customer)

- ***Last Name*** (customer)

- Suffix to Last Name

Take Note

DO NOT CLICK the Cancel button at the bottom of the Pick Account Box, or you will LOSE the data that you are entering.

- Middle Initial
  Enter "NMI" for no middle initial.

- Prefix
  Enter the appropriate prefix so that the customer can be addressed by the appropriate prefix in the future.

- Preferred Name

- Date of Birth (mm/dd/yyyy)
  The date of birth of the borrower is important for accessing his/her loan data. You can either enter the date or bring up the calendar and choose the date.

- Address (customer)
  Enter the address in this field. Notice the **ellipsis** button at the end of the field. This button allows you to enter multiple addresses for this customer if necessary. This feature may not be used often; however, once you click the **ellipsis** button, OCTS 2.0 requires you to enter the address in the box that appears. You will then click Close to return to the account record.

- City

- State
  Pick the state from the picklist or enter the two letter abbreviation in all caps.

- Zip code
  This field can be populated with other postal codes for customers calling from outside of the U.S.A.

- Country

- Site
  When you enter "Not Given" in the Account field (when the borrower's SSN is not given), **you must also populate the Site field with the Case #.** This is very important—we must create a unique identifier for each "Not Given" Account. If we did not differentiate one "Not Given" Account from another, it would be very difficult to distinguish between these accounts.

- ***Contact Method*** (customer)
  This field indicates the method by which the customer prefers to be contacted. You must then enter the information for the method that you indicate as preferred in the fields below.

- Home Phone #
  This may be entered without formatting—OCTS 2.0 will format the phone number automatically.

- Work Phone #
  OCTS 2.0 will automatically format the number, including the extension number.

- Fax Phone #

- Mobile Phone #

- Country Code (for phone number, if foreign country)

- Hours Available

This is a short field—e.g. “8am to 5pm” or “Daytime.”

- Hours Available Time Zone
  The four most common time zones for the US and Canada are listed at the top of the picklist. The remaining values are listed in alphabetical order.

- 1st Email/Homepage

Take Note

The email address will turn into a hyperlink after you advance to the next field. If you click on this hyperlink, an error will appear because OCTS 2.0 is looking for a web site. Click through the error and continue.

- 2nd Email

- Comments (any special comments about this account)

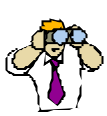
- Reminders
  This is not a data entry field. The Reminders field will populate automatically with a reminder message if needed. For instance, if you selected “Home Phone” for Contact Method and did not populate the Home Phone field, a message will appear in this field, reminding you to enter the home phone.

DO NOT CLICK the Cancel button at the bottom of the Pick Account Box, or you will LOSE YOUR DATA. You have entered all of the information for the account record. **You must now pick this record by following the next two steps.**

25. *Select* the record that you have just created by verifying that the record is highlighted (and a red arrow is pointing to the left of the record).
    If the correct record is not highlighted, *click* inside the record or to the left of the record (but not on a hyperlink).

	Account	Account Type	First Name
›	258-00-0000	Customer	Katherine
	000-00-0000	Customer	John
	001-56-2234	Customer	Corey

26. *Click* the **Pick** button at the bottom of the Pick Account Box.

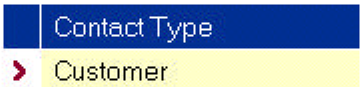


Take Note

The information that you have just entered in the account record in the Pick Account Box has now been copied automatically to the same fields in the customer contact record in the Pick Contact Box. You do not have to enter the data twice! The new customer account has successfully been linked to this customer contact.

DO NOT CLICK the Cancel button at the bottom of the Pick Contact Box, or you will LOSE YOUR DATA. **You must now enter the third party contact information! Follow the steps carefully.**

27. *Ensure* that the customer contact record is highlighted/selected.

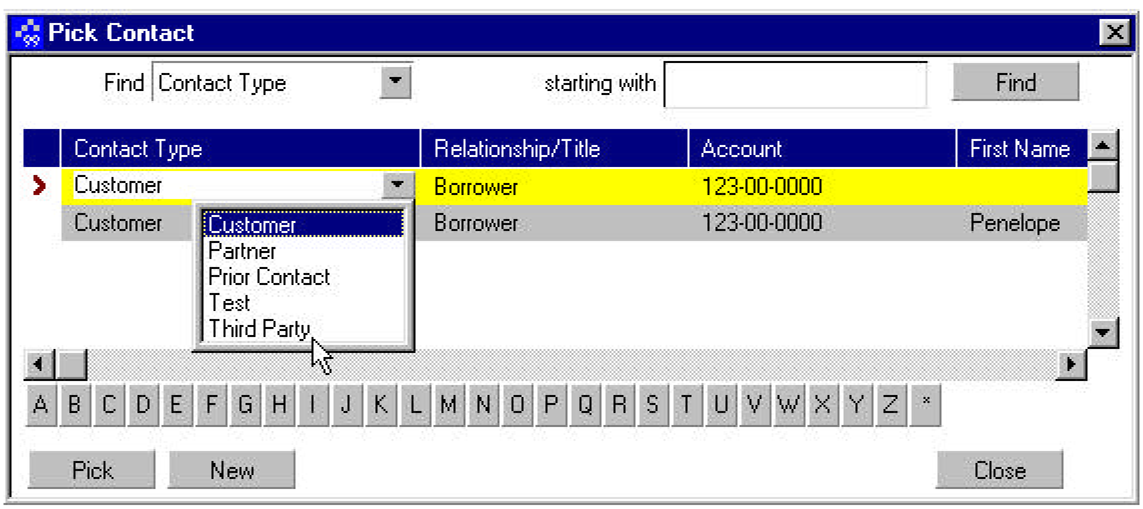


28. *Right-click* in the Pick Contact Box.

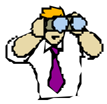
29. *Select* **Copy Record**.
This creates a copy of the contact record that you have just created for the customer. **Copying the record ensures that you maintain the correct account information for both the customer *and* the third party.**

Your cursor should be in the Contact Type field of the new record that you just created (a copy of the customer contact record). You will now populate the fields on this new record for the **third party contact**. *Press* **Tab** to advance to each field. If the information for the third party contact is different from the information for the customer, then you may type over the value that has been copied. DO NOT change the value in the Account field—you want both of these records to be linked to this customer's account.

30. *Change* the ***Contact Type*** to "Third Party" (shown below).



31. *Change* the ***Relationship/Title*** to the appropriate relationship of the third party contact to the borrower.



Take Note

Do not change the Account or you will lose the connection to the correct customer account.

However, if you unintentionally delete the value in the account field, you can bring up the Pick Account Box (like you did when you originally entered the account) in the Account field. *Search* for the customer's account with the SSN in the Account field. *Select* the correct account and *click* the **Pick** button.

32. *Enter* all information about the third party contact that is *different* from the customer's information. For example, if the third party has a different address than the customer, type over the customer's address with the correct third party address.

DO NOT CLICK the Cancel button at the bottom of the Pick Contact Box, or you will LOSE YOUR DATA. **You will now pick this third party contact as the primary contact for the case.**

33. *Select* the **third party contact record** (the red arrow will be pointing to the left of the record).

34. *Click* the **Pick** button at the bottom of the Pick Contact box.
    The Last Name, First Name, and Home Phone Number of the third party contact can now be seen in the Cases applet. The Account field contains the borrower's SSN.

You are now back to the cases applet on the Cases Screen, All Cases View. You only have a few more steps in creating this case!

1. *Press* the **Tab** key.

2. *Enter* the primary loan information:
   Although the customer may have multiple loans, you must populate these fields with the loan most involved in this case and the agency that is contacting the customer about this case.

   - ***Svc Agency (Servicing Agency)***
     Select from the picklist. If unknown, select Unknown.
   - ***Loan Type***
     Select from the list. If unknown, select Unknown. *Click* the **Pick** button.
   - ***Loan Status***
     Select from the picklist. If unknown, select Other.

3. *Review* all of the fields that you have populated in the cases applet to make sure that all information is correct.

4. *Note* that the following fields have been populated automatically:

- Case Number
  You will give this number to the customer for future reference.

- Intake Person
  This defaults to your user name because you created this case.

- Status
  This defaults to "Open."

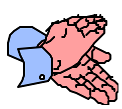
- Sub Status
  This defaults to "Unassigned"—you will leave this as Unassigned so that OCTS 2.0 can assign the case to an Ombudsman Specialist after you leave this screen.

- Ombudsman field—**You will leave this field blank.** This will be automatically populated when OCTS 2.0 assigns this case to an Ombudsman Specialist.

- Date Received.
  This defaults to your system's current date and time.

You have now created a new case for the new customer! To save this case record, you must click on a part of the screen other than the Cases applet. For example, you should click on the view bar. If you have left any required fields blank, you will receive an error message telling you the field that you left blank. You can then go back and populate the required field.

You can now proceed with other work. Congratulations!



Congratulations!

You have now created a new case, a customer contact, a third party contact and a customer account! These records are associated with each other through the borrower's SSN in the Account field.

Lesson 3: General Assistance (John Q. Public)

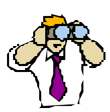
Description: **An important part of OCTS 2.0 is the ability to report on how many cases are handled by the Office of the Ombudsman. For this reason, you must log a case for each call/correspondence that comes in, even if the nature of the call/correspondence is general assistance. OCTS 2.0 will then accurately reflect the number of requests that are handled by the Office of the Ombudsman.**

Intake Specialists—you will follow this lesson if you have started scripting and discovered that the call was a general assistance call.

A special contact and account have already been created for logging general assistance calls. This special contact record is **John Q. Public**. It is linked to the account 000-00-0000.

1. *Go to* the Cases Screen, All Cases View.

2. *Click* the **New** button in the Cases form applet at the bottom of the screen to create a new case.



Take Note

The cursor begins in Original Issue Summary. You must press the **Tab** key on your keyboard to advance to the next field. The tab order on this screen follows the flow of a typical call.

3. *Populate* these fields (populate the required fields at a minimum):

   - ***Original Issue Summary***
     Briefly explain why the caller was contacting the Ombudsman and how you handled the call.
   - ***Original Issue Category***
     Classify the nature of the call. Select from the picklist.
   - ***Original Issue Sub Category***
   - Customer Expectation Summary
   - Customer Expectation Category
   - Customer Expectation Sub Category
   - ***Referred By***.

4. *Tab* to the Last Name field and press **F2**.
   Or, *Click* the **drop-down arrow** button in the Last Name field.
   The Pick Contact Box appears.

5. *Select* Account in the **Find** field.

6. *Enter* "000-00-0000" in the **starting with** field to find the John Q. Public record.

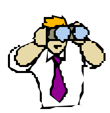
7. *Press* Enter on your keyboard.
   Or *Click* the **Find** button.

The John Q. Public record will automatically populate the First Name, Last Name, and Account fields in the Cases applet.

8. *Press* **Tab** to advance to the Servicing Agency field.

9. *Populate* the following required fields:

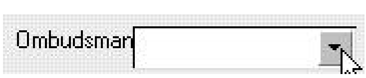
   - ***Svc Agency (Servicing Agency)***
     Select who is contacting the borrower about the loan. If unknown, select Unknown.
   - ***Loan Type***
     Select the primary loan that is involved in the case. If unknown, select Unknown.
     Press **Pick**.
   - ***Loan Status***
     Enter the status of the loan. If unknown, select Other.



Take Note

For general assistance cases, you must manually assign the case to a generic ID so that the case will not go to an Ombudsman Specialist (this process is outlined below).

10. *Click* the **drop-down arrow** button in the Ombudsman field.
    The Pick Case Owner box appears.



11. *Type* "GENASSIST" for General Assistance in the **starting with** field, at the top of the Pick Case Owner box.

12. *Press* Enter.
    The case has now been assigned to a generic ID that has been established for general assistance calls.

You now must link a result to this case.

13. *Go* directly *to* the Results Search View by choosing this view from the view bar (shown in the screen print below).

14. *Click* the **New** button in the Results applet at the bottom of the screen.
    The Results Pick Box appears.

If you want to pick an existing result, follow these steps:

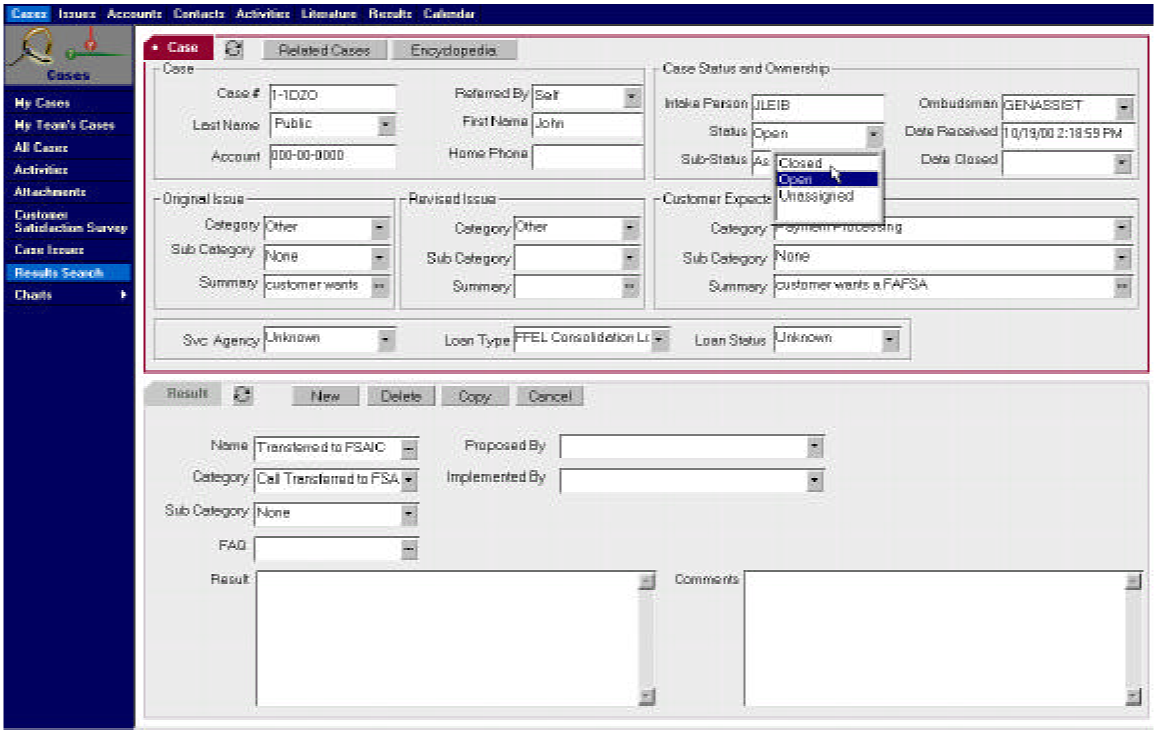
- *Click* the **drop-down arrow** button in the Find field at the top of this Pick Box.
- *Select* the field in which you want to search.
- *Enter* the search criteria in the starting with field.
- *Click* the **Find** button at the top of the Pick Box.
- *Select* the desired result.
- *Click* the **Pick** button at the bottom of the Pick Box.
  The result will populate the fields on the left side of the Results applet.

If you want to enter a new result for this case, follow these steps:

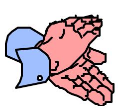
- *Click* the New button at the bottom of the Pick Box.
  This creates a new results record.
- *Select* the Result Category from the picklist in the Result Category field.
- *Select* the Result Sub Category.
- *Enter* a short name for this result in the Name field.
  This is a short free-form text field. Make sure that the name of the result is generic so that it can be used for cases in the future.
- *Enter* more generic result detail in the Result field if desired.
- *Enter* values in the Proposed By and Implemented By fields if desired.
- *Enter* any comments specific to this case in the Comments field.

You are now ready to close this case.

15. *Click* on the **drop-down arrow** button in the Status field in the Cases applet at the top of the screen (shown below).



16. *Select* Closed.



Congratulations!

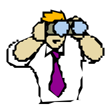
You have successfully recorded a case for a general assistance call! This will help the Office of the Ombudsman to accurately report and analyze the number of requests that are handled.

Lesson 4: Via Correspondence

Description: **As an Ombudsman Specialist, you may receive correspondence from a customer for whom you must create a new case. This procedure is the same procedure as in Lesson 1-2; however, after you create the case, you must add an activity to the case that records the receipt of the correspondence.**

For this lesson, we will assume that you have just created the case (following the appropriate procedure). Therefore, we will begin with the steps for adding the activity.

You have just entered the new case and are on the Cases Screen, All Cases View.



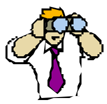
Take Note

Note that this procedure for adding an activity to a case will apply to all types of activities. More examples of adding activities to a case will be covered in Module 4, Lessons 3-4.

1. *Select* the desired case from the Cases Screen, All Cases View.

2. *Click* on "Activities" on the view bar.
   This view shows you the detail of the desired case in the form applet at the top of the screen and the activities for the case at the bottom of the screen. The activities at the bottom of the screen are displayed in a list applet.

3. *Click* the **toggle** button to see the activity information in a form applet.



Take Note

If you find that you prefer to enter the activity information in the list applet rather than in the form applet, you can do so. While in the list applet, you must *right-click* in the form applet and *select* “New Record.” This creates a blank record in which you can enter the same information.

4. *Click* the **New** button in the Activities form applet.
   This inserts a blank activity record.

5. *Note* that the following fields are populated automatically:

   - Case #
   - Last Name
     This defaults to the primary contact linked to the case.
   - First Name
   - Account
   - Assigned To
     This defaults to you because you just created the activity.
   - Planned Start
     This defaults to the current date and time.
   - Due
     This defaults to the current date.

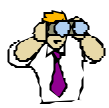
6. *Enter* in the information for the activity (enter the required fields at a minimum):

   - ***Activity Type***
     To log the receipt of correspondence, you will choose “Correspondence.”
   - ***Description***
     This will be a short description of the activity, limited to approximately 200 characters. For recording the correspondence, you will briefly describe the type of correspondence that was received from the customer to initiate the case.
   - Priority
     Use this to help you manage your work.
   - Status
     Use this to help you manage your work.
   - Comments
     Describe in more detail who wrote the letter, the date of the letter, the date received, and the subject of the letter.

When you have completed entering all information for this activity, you are ready to end the activity.

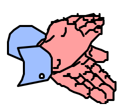
7. *Change* the Status to “Done.”
   This will automatically populate the Actual Completion field with the current date and time. The Duration field will automatically populate with the calculated time that it took to complete the activity.

   Or *Enter* the correct date and time in the Actual Completion field.
   This will automatically change the Status to “Done.”



Take Note

Press the toggle button to view the activity you just entered in the list applet.

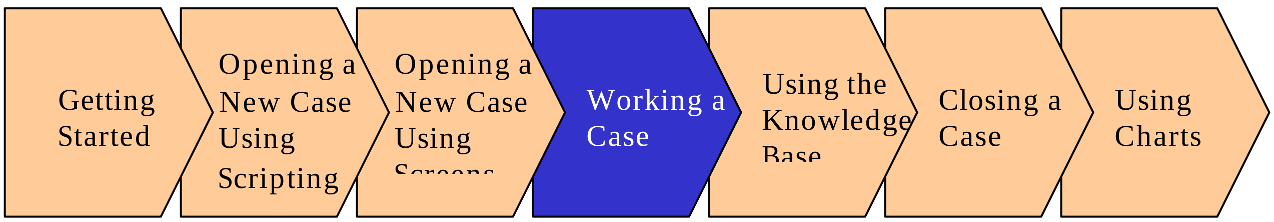


Congratulations!

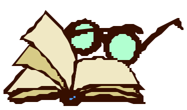
You have successfully created a case that was received via correspondence! First, you created the case, and then you logged the receipt of the correspondence with the activity.

Module 4: Working a Case

Lesson 1: Using Queries
Lesson 2: Reviewing Your Assigned Cases
Lesson 3: Adding an Activity (Customer/Third Party)
Lesson 4: Adding an Activity (Partner)
Lesson 5: Adding a Partner Contact/Account
Lesson 6: Updating Demographic Information
Lesson 7: Adding Issues to a Case
Lesson 8: Attaching a Document to a Case or Activity
Lesson 9: Reopening a Case



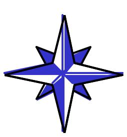
About this Module



Overview

This module focuses on the work of the Ombudsman Specialists; however, some of these procedures also apply to the work of the Intake Specialists. This module covers the broad range of activities involved in working a case. Note, however, that the activity of researching a case is covered separately in the next module.

In this module, "working" a case includes using queries, reviewing assigned cases, adding activities, updating a case when more information is received, adding issues to a case, attaching a document to a case or to an activity, and reopening a case if necessary.



Objectives

After reviewing this module, you will be able to perform the following procedures:

- Review your assigned cases
- Add an activity to a case
- Add a new partner contact and account
- Update an existing case when more information is received
- Attach a document to a case or to an activity
- Reopen a case.

Lesson 1: Using Queries

Description: **Often in your work, you will search for an existing record or records in OCTS 2.0 using a query. A query searches the OCTS 2.0 database for specific data based on the criteria that you enter. You may also want to save a query for future use.**

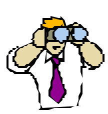
For example, when you want to find a particular case, you could execute a query using the borrower's SSN in the Account field, or the case number in the Case # field. If you want to view all cases with the Original Issue Category of Deferment, you could execute a query by choosing Deferment in the Original Issue Category field on the Cases Screen.

Follow the steps below to use a query to find a particular case. These steps also apply to retrieving other records in other screens. For instance, you could also go to the Accounts Screen and query to find a particular account using the steps below.

1. *Go* to the Cases Screen, All Cases View.

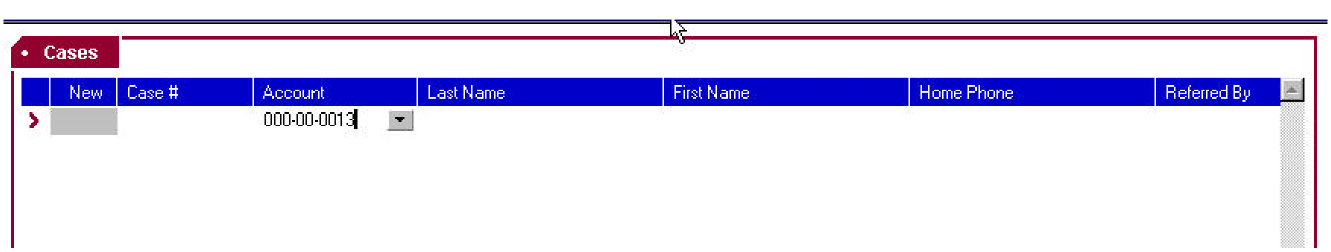
2. *Click* the **New Query** button on the tool bar.
   
   This creates a blank record in which you will enter your criteria.

3. *Type or select* data in any of the fields (in the list applet or in the form applet) to specify the search criteria for the query.
   For example, enter customer's SSN in the Account field, the contact's last name in the Last Name field, and/or case number in the Case # field. Notice in this picture we have entered the criteria in the list applet at the top of the screen.



Take Note

Queries are case and format sensitive! Make sure that you enter the values exactly as they appear in the system. For example, you must enter the SSN with the dashes, and you must enter last name with the first letter capitalized.

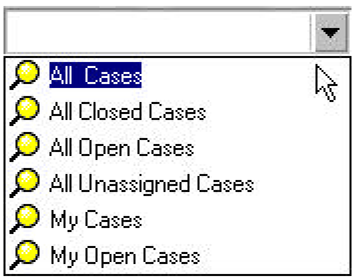


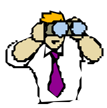
4. *Press* Enter on your keyboard.
   Or *Click* the **Execute Query** button on the tool bar.
   
   The record or records that fit your criteria will appear.

When you are ready to go back to viewing all records, you must follow step 5-6.

5. *Click* on the **drop-down arrow** button in the predefined query box.

6. *Click* on the All Cases query.





Take Note

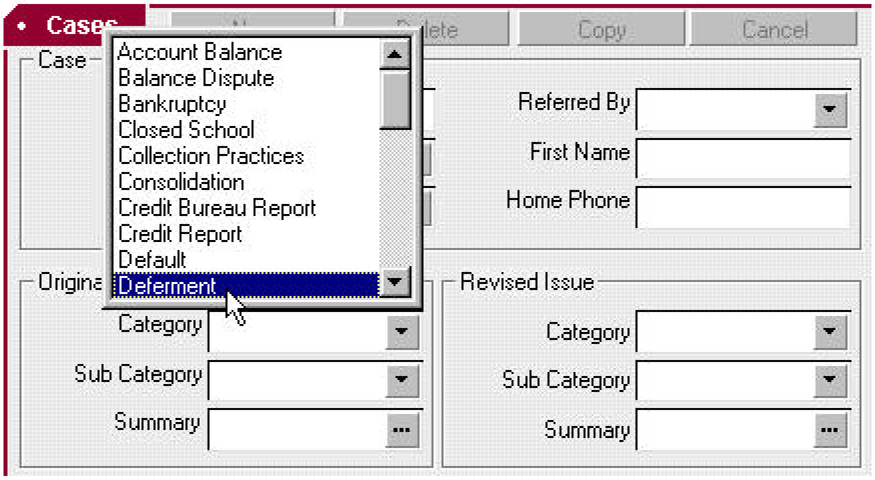
After you have executed a query, you can also retrieve all records by clicking once on the New Query button on the tool bar  and then once on the Execute Query button . Because you have not entered any criteria, OCTS 2.0 will bring up all records.

Let's try another example of using a query to find a particular set of records. You should be starting with all of the records visible.

7. *Ensure* that you are on the Cases Screen, All Cases View.

8. *Click* the **New Query** button on the tool bar.

9. *Type* or *select* data in any of the fields to specify search criteria.
   For example, you could select "Deferment" in the Original Issue Category field to search for all cases with the Original Issue Category of "Deferment." Notice in this picture, we have entered the search criteria in the form applet at the bottom of the screen.



Take Note

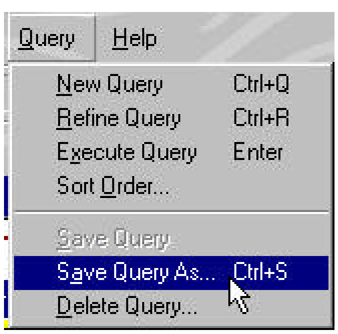
You can enter criteria in as many fields as you would like. For instance, you can select "Deferment" as the Original Issue Category and "SLMA" as the Servicing Agency. OCTS 2.0 will look for all cases that fit this criteria.

10. *Press* **Enter** on your keyboard.
    Or, c*lick* the **Execute Query** button on the tool bar.

Once you have executed a query, you may want to save the query for future use. To save a query, follow the steps below.

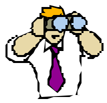
11. *Click* the Query menu on the menu bar.

12. *Click* Save Query As.



13. *Enter* the name of the query.
    For example, you could name this query "All Deferment Cases."

14. *Click* OK.
    Notice that you can now see this query in the Saved Query box in the top right part of the screen.



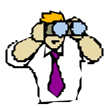
Take Note

The queries that you save will "update" themselves each time you access them. For instance, if you have created a query for "All Deferment Cases" and you access that query each week, the system will search **all records in the system at the time that you select that query**. Therefore, each time you access the query, you will see an updated set of records.

Because you have created and saved a query, this screen will default to this query each time you leave and return to this screen. Therefore, you must remember that there are other records in this screen—they are hidden because of the query that you just created. To see all of the records, you must follow the steps below.

15. *Click* the **New Query** button.
    You are now creating a query for *all* of your records.

16. *Click* the **Execute Query** button *without* entering criteria.
    This brings back all of the records.



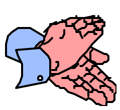
Take Note

To view All Cases, you can also choose the All Cases query in the predefined query box at the top right of the screen.

The following table describes several advanced querying functions:

Symbol	Query Function
*	Searches for all values with various characters in the place of the asterisk. For example, **Smi*** finds Smith, Smith & Reese, Smithson, and Smi, but not Smathers.
<	Finds all records **less than** the value entered. For example, **<03/25/1994** finds all records in which the value in the field is **before** March 25, 1994.
>	Finds all records **greater than** the value entered. For example, **>03/25/94** finds all records in which the value in the field is **after** March 25, 1994.
<>	Finds records that are **not equal** to the value entered.

<=	Finds records that are **less than or equal to** the value entered.
>=	Finds records that are **greater than or equal to** the value entered.
IS NOT NULL	Searches for **non-blank** fields.
IS NULL	Searches for **blank** fields.
LIKE	Searches for values starting with the indicated string.
NOT LIKE	Searches for values not starting with the indicated string.
“ ”	Searches for strings that contain special characters, such as a comma (,).
AND	Searches for all records that meet all conditions entered. For example, **>=01/01/2000 AND <=01/31/2000** finds all cases that were received between 01/01/2000 and 01/31/2000.
OR	Searches for all records that meet at least one of the conditions entered.
NOT	Searches for records that do not meet the condition entered.



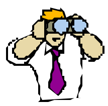
Congratulations!

You have learned how to use queries to find information in OCTS 2.0! You will use these querying techniques often in your work.

Lesson 2: Reviewing Your Assigned Cases

Description: **After new cases have been opened, OCTS 2.0 Assignment Manager automatically assigns the cases to you, an Ombudsman Specialist. This assignment is based on rules that have been established by the management team. The next phase of the case lifecycle is working a case. In this lesson, you will learn how to review the cases that have been assigned to you.**

1. *Go to* the Cases Screen, My Cases View.
   Here you will see all of your cases—this includes open and closed cases. You will use this screen often to review all of the cases for which you are responsible.

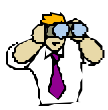


Take Note

OCTS 2.0 automatically assigns new cases to Ombudsman Specialists after the cases are created during the intake process. This assignment is based on your availability, workload, and specialty. New cases that have been assigned to you will be flagged by a star in the New Column.

The star will disappear when you (the Ombudsman Specialist assigned to the case) click on the case, as explained in the following steps.

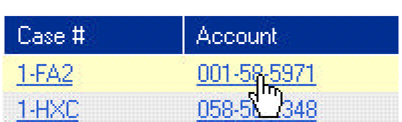
2. *Scroll* up and down the list of cases using your up and down arrow keys on your keyboard.
   The detail of each case can be viewed in the form applet at the bottom of the screen.



Take Note

Note that you are looking at **all** of your cases, both Open and Closed. To see particular cases (such as All Open Cases), use the querying techniques outlined in Lesson 1 of this module.

3. *Click* on the hyperlink under Account to view the account information for this case.



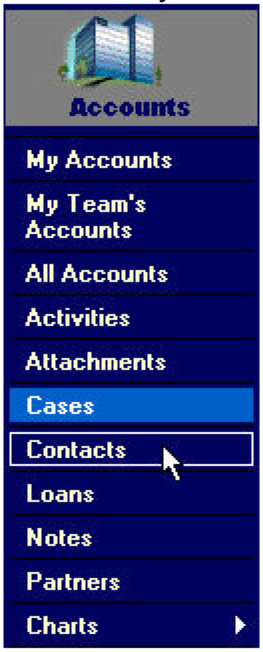
Case #	Account
1-FA2	001-58-5971
1-HXC	058-5[illegible]348

This takes you to the Accounts Screen, Cases View. The account information for this customer is at the top of the screen. *Click* the **toggle** button to see other demographic information for this customer.

All cases for this customer are listed at the bottom of the screen. Most customers will only have one case; however, a customer may have multiple cases that were created at different times.

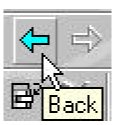
4. *Go to* the Contacts View on the view bar.

This shows you the customer contact and any third party contacts that are linked to this account.



5. *Scroll* to the right of the contact record to view all of the contact information for this account.

6. *Click* the **Back** button on the history bar twice to return to the Cases Screen, My Cases View.



Most cases will not have activities at this point. However, if the case was received via correspondence, there will be an activity for this case.

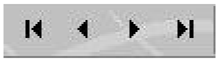
7. *Click* on the hyperlink under Case # in the list applet at the top of the screen to view the activities of a particular case.

This brings you to the Cases Screen, Activities View. This view shows you the detail of this case at the top of the screen and the activities for the case at the bottom of the screen.

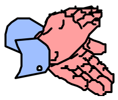
8. *Review* the activities for the case.
You can review the activities in the list format, or you can follow the next step.

9. *Click* the **toggle** button.
The detail of the first activity is displayed in a form applet.

10. *Use* the **Next** and **Previous Record** buttons on the tool bar to view all activities listed for this case.



11. *Go* back to the My Cases View to review other cases that have been assigned to you.



Congratulations!

You have successfully reviewed your assigned cases! You now know how to review all of your cases and view the details of a particular case.