18 Tips for Using Dovetail to Better Manage Employee Coronavirus-related Questions

We wanted to share with you 18 features (or tips) of the Dovetail system that can help reduce, manage and monitor the influx of coronavirus-related questions and incidents. At the same time, you will be able to more effectively react to a rapidly changing environment and implement measures that help safeguard your workforce and customers.

We understand how employees may be feeling anxious in this current climate. By implementing these suggestions, we hope you will be able to help employees through current events and increase your team's ability to manage the increased workload.

The Dovetail Team

Remote Working   Analytical Dashboards

Employee Portal   Reports

Live Chat   Routing and Event Rules

Chat Bots   Assets

Case Types   Data Restrictions

Flexible Fields   Queues

Global Labels   Notifications

Solutions   Templates

Broadcasts   Service Level Agreements (SLA)

1. Remote Working

Key Benefit: Dovetail is in the cloud, which means Employees and HR can connect to Dovetail from any device, from any location.

One of the first things to remember is that the Dovetail system is a cloud-based application. This means that your Employees and your HR Users may connect to the Dovetail system from any internet enabled device. We believe in 2020 more and more employees will be working remotely from home, therefore Employees and HR Users can work remotely on their own devices.

2. Employee Portal

Key Benefit: An online communication platform for employees that offers 'self-serve' capabilities that deflect emails and phone calls into HR (by more than 50%)

We have already seen many of our customers start to add coronavirus content such as awareness sheets, FAQs, internal video announcements, and links to external government portals within their Dovetail Employee Portal.

You might add a button onto the home page or add dedicated pages about the coronavirus and how your organization is handling the situation. You can also add content on remote working, tips and tricks, and advice and guidance. For those workers now working from home who also have children at home because of school closures, you could also add ideas for parents/ tips and suggestions and activities for children etc.

The Employee Portal provides a line of communication to your employees, enabling you to send updated information and receive continual feedback from your employees.

We also suggest adding new Portal Case Types and new Menu items so employees can locate information you share about coronavirus fast and log a case with you when needed 24x7.

3. Live Chat

Key Benefit: An additional real-time communication channel for your employee questions, with the ability to route chats to most relevant person in HR

Employees are looking everywhere for answers to their questions about coronavirus. Live Chat, which can be enabled on your existing Dovetail Employee Portal very quickly, or enabled on your existing company intranet/ SharePoint, opens another channel of two-way communication, providing your employees with another mechanism to obtain answers quickly and provide immediate feedback.

Your HR Chat users can redirect your employees to the help guides/ content you have shared over the portal, or log cases through Chat to capture employee questions.

Furthermore, reducing response wait time can reduce anxiety among many of your workforce.

4. Chat Bots

Key Benefit: Provide out-of-hours coverage and guidance through a chat experience

Info Capture Bot

The Info Capture Bot is a chatbot that is available 24/7. Info Capture Bot can take out-of-hours questions or when all HR chat users are busy. A Case will also be created at the end of the info capture process and routed through to a Queue for HR to follow up. This will then allow the HR team to take in any coronavirus related questions 24/7 and be able to respond to them through the case once an HR user is available.

Guide Bot

Guide bot is a chatbot that allows you to divert employees with questions to the relevant team that can handle that question through a chat interface. For example, if a dedicated team has been created to manage coronavirus questions over chat, the Guide Bot can route the employee through to that team.

5. Case Types

Key Benefit: Accurately categorize and report on employee questions and enable auto-route for faster response times

To accurately capture, monitor and track employees' coronavirus questions, we suggest that you add new Case Types.

For example, you might add this parent Case Type with these child Case Types:
- Coronavirus
  - Question
    - Sick Pay
    - Remote Work
    - Cancelled Trips
  - Suspected Case
  - Confirmed Case
  - General Inquiry

By using a Case Type to classify these types of questions you can make use of additional Dovetail features such as Flexible Fields, Workflow/ Rules, Reporting, SLA Assignment, Notifications etc. - we will explain these in greater detail within this help guide.

6. Flexible Fields

Key Benefit: Capture additional data for more accurate reporting

Flexible fields are custom fields that Dovetail Customer support can create for you if you contact our support team. The fields are Case Type related, allowing you to capture extra data that is specific to the case in question.

For example, Case Type: Coronavirus> Suspected Case

Examples of Flexible Fields on the Case page, which allow you to capture more info could be:
- Date you fell ill?
- Date you stayed home?
- Date you can return to work?
- Have you contacted your primary care?
- Do you have a fever?
- When were you last in the office?
- Is there anyone at work you have been in contact with?

7. Global Labels

Key Benefit: Locate high priority cases faster, provide tight data security restrictions, and trigger automated Workflow Event Rules

Global Labels are colored tags where you pick the name of the label and select the color. You can tag them to a case, both manually and automatically, by using the workflow functionality. Adding a label to a case enables you to locate the case more quickly on the homepage console, and to have a workflow rule trigger.

One suggestion is to create a label, for example, called "2-day reminder", which has a workflow rule to remind you 2 days after the label was added to a case. This could be used to remind the case owner to check in with an employee, who has reported to HR that they are feeling unwell and are staying at home for isolation reasons. You can also create longer or shorter reminders, and have them trigger, through workflow rules, during business hours or calendar hours/ elapsed time.

Another useful feature of Global Labels is that they enable data restrictions. For example, you may wish to restrict access to coronavirus cases to a team, specifically set up to handle all

coronavirus related questions. Using Global Labels to restrict access provides greater employee data confidentiality.

8. Solutions (Knowledge Articles)

Key Benefit: Create and distribute knowledge to employees and HR to help deflect questions

Dovetail has a built in Knowledge Management tool that uses records we call Solutions to store and share knowledge content. These Solutions can be created and shared among your HR team and published to the Dovetail Employee Portal.

We have already seen customers create and share knowledge content regarding the coronavirus in the form of articles, help sheets, company response videos, guides, and links to external sites such as WHO, CDC and government information sites etc. This is a great way to keep your employees and HR teams updated and well informed.

You can also create translated content, as well as content specific to employees of different nationalities.

9. Broadcasts

Key Benefit: Mass email communication tool, that improves exchange of information with employees

Broadcasts allow you to mass communicate via email and quickly send messages to your workforce, which is particularly useful when staff are based at different site locations.

For instance, if an employee calls in sick from one of your offices that houses 100 other employees. The employee is suspected of coronavirus so is asked to stay home and self-isolate. In two days, you check in with your employee and it is confirmed that they have tested positive for the coronavirus. You decide you want to announce to all employees working at the same location that they must now work remote for the next 14 days. The broadcast tool enables you to transmit this message effectively.

Another example might be that you want to announce to your employee's new updates/ policy changes around this situation. This can be handled through the Broadcast feature.

10. Analytical Dashboards

Key Benefit: Live analytics to monitor and enable complete visibility of HR work and operations

Real Time Dashboards dedicated to coronavirus cases give your management team instant insight into volumes of cases, associated hot spots, and can include any suspected or confirmed cases along with their geographic location (via the mapping chart).

Use the report link feature to enable drill downs from dashboards into the actual report data, and then drill down to the case, site, or employee record.

11. Reports

Key Benefit: Live analytics to drill down into key metrics, evaluate data and generate insights

Reports can be built that filter on the Case Types and Global Labels that you created to classify coronavirus related cases. You can then monitor new cases, average time to close, volume of cases, hotspots, close case rate, SLAs etc. Then roll all reports into a single dashboard for high level summaries.

12. Routing Rules and Workflow Business Event Rules

Key Benefit: Automated workflow handling, which saves effort and time, while reducing manual errors

You can create a formal process for handling coronavirus cases that will have certain procedures and processes that need to be adhered to. For example, you might define that for every employee suspected of having coronavirus, you must log and classify the case, then check in with the employee every 2 days. It might be that, at this stage, these cases are routed through to a specialist team. Then if the employee were to confirm positive for coronavirus, you might wish to check in daily, arrange medical expenses, or make internal announcements to other colleagues that were in contact with the employee etc. If you decide to adopt a formal process you can use the Routing Rules and Workflow Event Rules in Dovetail to help maintain and monitor this formal process.

13. Assets

Key Benefit: Easier report tracking for accurate monitoring of employees affected by coronavirus

Dovetail provides an Asset tracking feature that allows you to create Assets and assign them to Employees. These are typically Assets such as Cars, Credit Cards, Certifications etc. However, we believe that some customers might wish to add an Asset for "Coronavirus - Confirmed" simply to help with reporting confirmed cases against employees.

Note, there are better ways you can do this via Case Types and Case Reporting, however we want to provide you with options on how you might wish to handle this within your Dovetail system.

14. Data Restrictions

Key Benefit: Data segregation throughout case lifecycle to ensure confidentiality and security of employee information

There are several data restriction capabilities within Dovetail which can be used to limit who has access to certain types of cases. You could use Queues that are restricted or Global Labels. This minimizes the level of access your users have to coronavirus cases.

You can create a dedicated team to handle the employees' coronavirus-related questions. The Dovetail system enables you to create data restrictions, so that this team can only work these types of cases, and not see the other HR related questions (to which that should not have access to). This is particularly useful if the team dedicated to coronavirus questions sits outside of HR.

15. Queues

Key Benefit: Provides security and workflow automation, which drives efficiency gains

A Queue in the Dovetail system allows you to store work items such as Cases and Solutions. Typically, as a Case progresses through a given workflow, it will go through one or more Queues. For example, a General HR Queue then onto a Subject Matter Expert Queue E.g. Payroll.

Queues have HR Users associated with them, who are either a Member of the Queue or a Supervisor of the Queue (or both). Notifications are sent to Queue Members and Supervisors when new Cases arrive in the Queue.

Data Restrictions may also be applied at the Queue level in Dovetail. This allows you to Restrict viewing of a Case in a Queue if the HR User does not have the permission to do so.

Therefore, Queues may be created to handle the routing of Cases from HR Users to teams specifically around coronavirus cases.

16. Notifications

Key Benefit: Enables tailored messaging and keeps people informed at the right time

The Automated Notifications feature provides tailored messaging and links to external portal pages or government information sites for HR owners of cases and employees. Notifications can be set up to remind a case owner to check in with an employee on a regular basis, if that employee has called in sick, with symptoms of the coronavirus for example.

We have already seen Dovetail Software customers adding guidance and help text to the automated case creation email (that is sent to an employee when they raise a case with HR). This could be a link to a page on the Dovetail Portal with coronavirus FAQs, or an external government site - or both.

One of our customers, Boston University, redirects their employees to here within their case create email - https://www.bu.edu/covid-19-information/

17. Templates

Key Benefit: Easy to use pre-built templates within Emails and Notes for faster responses to employees

When working a Case in Dovetail, HR may add Notes or Emails to the Case. HR, within these two areas, can also select from preconfigured Templates that auto fill the Note/ Email, allowing the dynamic filling-in of relevant data such employee name, HR User details etc. The Templates provide the HR user a fast way to make a Note or send an Email without having to type everything manually. This also provides a more consistent approach to Notes and Emails.

Templates can be created that contain coronavirus FAQ's, links to Employee Portal pages with advice and guidance, company video links, and links to external government information sites. These templates can then be used quickly by HR when working cases.

18. Service Level Agreements (SLA)

Key Benefit: Provides high level monitoring and automated notifications, that ensure the high-quality delivery of services is achieved

Within Dovetail you can add Service Level Agreements (SLAs) that allow you to monitor the progress of a Case from creation through to resolution/ closure. You can add any number of SLAs and use them for any number of instances. SLAs are applied to Cases through Workflow Event Rules. An SLA has a clock that ticks unless you put that clock on hold. The SLA Clock will count all time spent working the Case, which allow HR management the ability to monitor SLA performance and identify improvements.

To learn more about SLAs in Dovetail read this blog post on the Top 5 Benefits of SLA in HR Service Delivery.

You might decide to set up a formal SLA to help monitor and track coronavirus cases.

For example, if you log a case where an employee is suspected of having coronavirus or has travelled into the US and they must self-isolate for 14 days, an SLA could be used to help with monitoring and notifications during this 14-day calendar period. If the employee then tests positive for coronavirus, a new SLA can be applied to the case to provide a different level of monitoring and notifications.

Get in touch

We have tried to provide as many suggestions that we believe could help you in this unprecedented situation we all find ourselves in.

If you have any questions regarding any of these suggestions, or would like help with their activation and configuration, please do not hesitate to contact our Customer Support team (support@dovetailsoftware.com), who are ready to help you.