How to Create a Case in OneRF

1. Log in to Workday using your **ID** and **Password.**

2. In the search bar ❶ in **Figure 1**, type in **cases**.
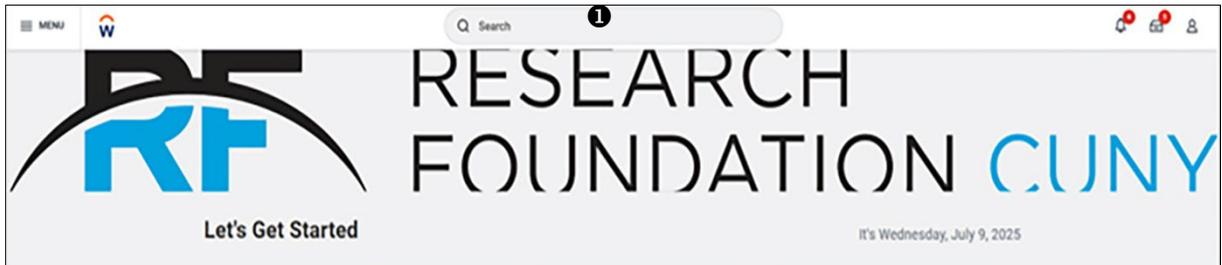

Figure 1

3. After you enter **cases,** click in the search space, and the **Tasks and Reports** ❶ screen **will** appear as shown in **Figure 2 below**. You can choose **Case History** ❶, **View a Case** ❷, **Create a Case** ❸, and **View My Cases** ❹. To create a case, click **Create Case** ❸
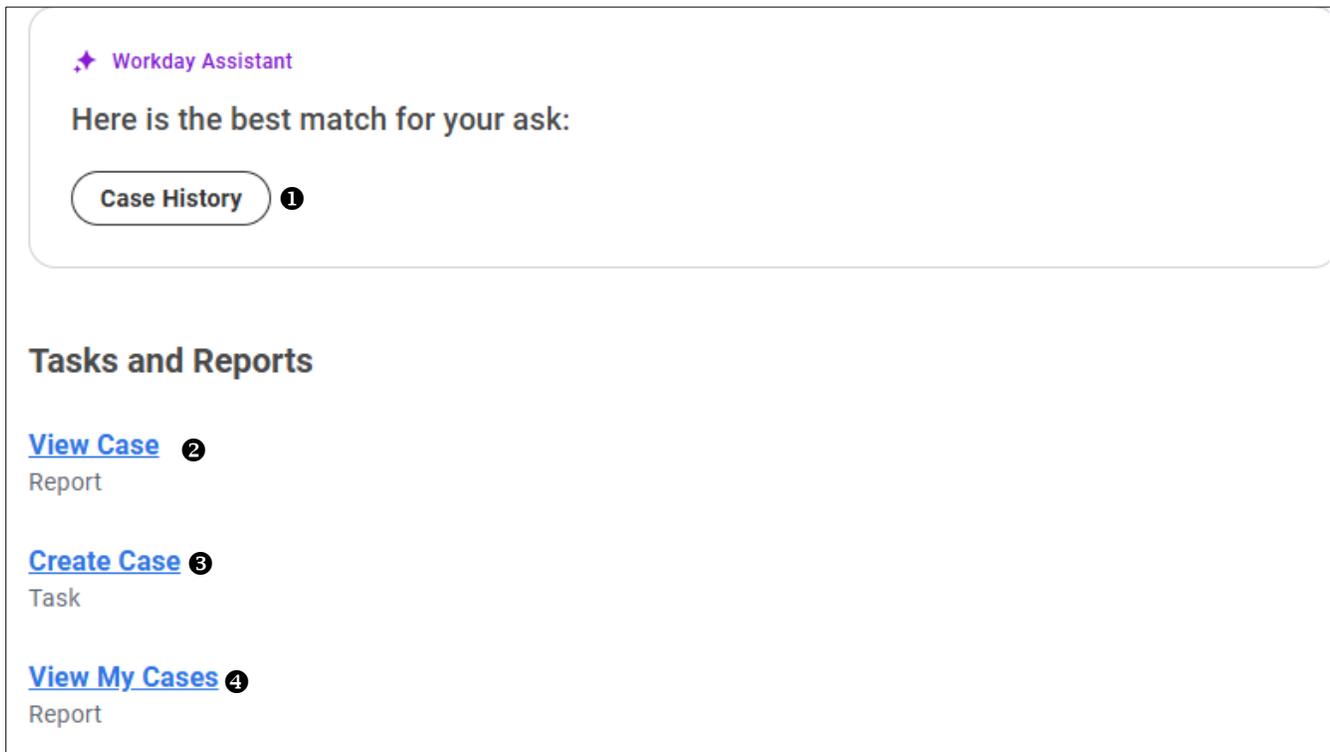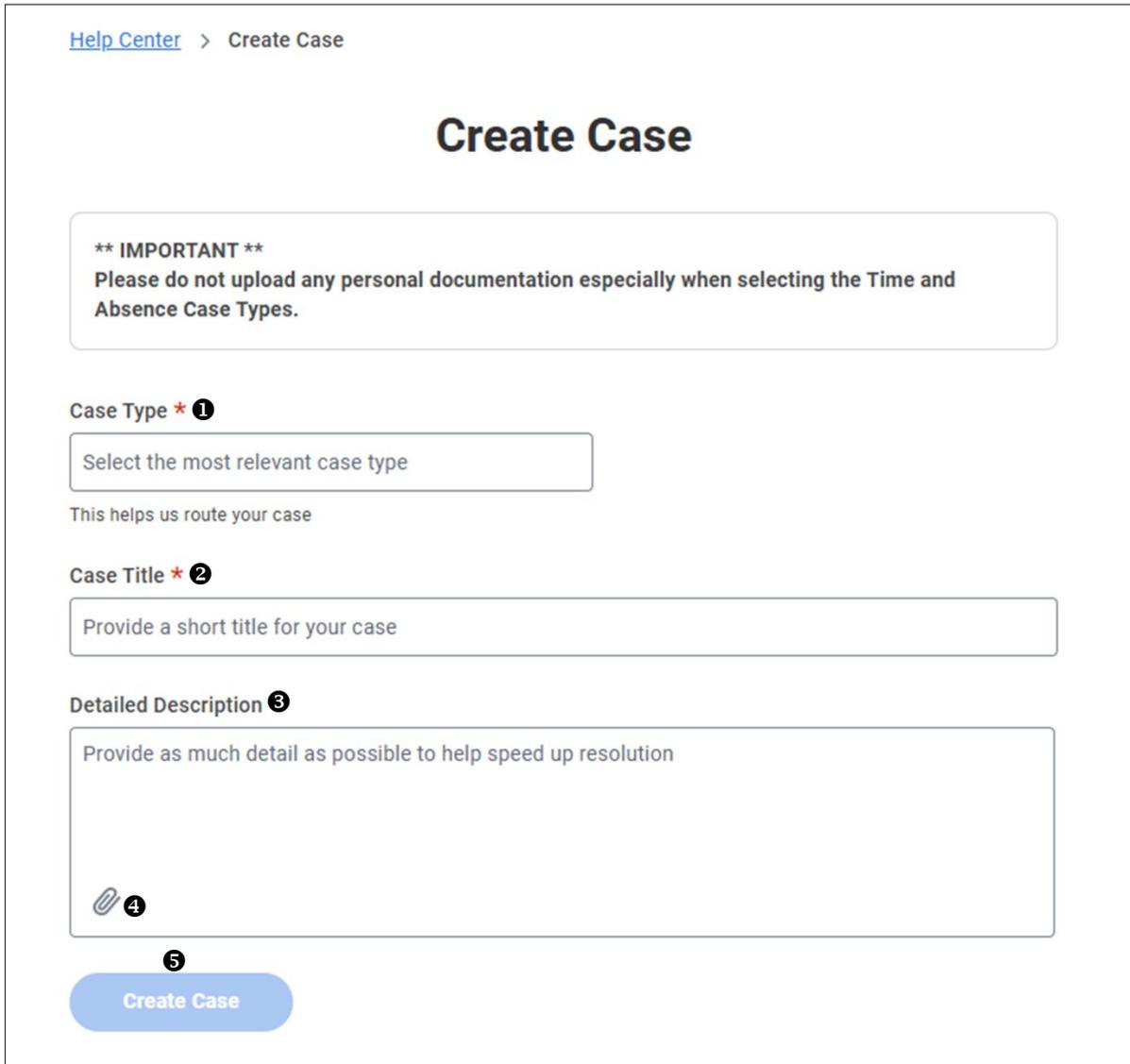

Figure 2

4. After clicking **Create Case** ❸, in **Figure 2**, on **Page 1**, the **Create Case** screen will appear as shown in **Figure 3 below**. Click on **Case Type** ❶, and a down-menu will open and select the **Case Type** from the list as shown in **Figure 4**. **Provide a Case** Title ❷, provide a **Detailed Description** ❸ and attach documentation by clicking on the **Paper Clip** ❹ 📎 and then click on **Create Case** ❺.

Help Center > Create Case

Create Case

** IMPORTANT **
Please do not upload any personal documentation especially when selecting the Time and Absence Case Types.

Case Type * ❶

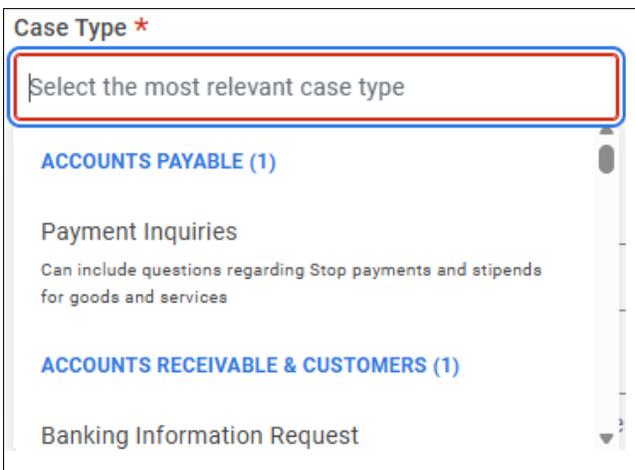Select the most relevant case type

This helps us route your case

Case Title * ❷

Provide a short title for your case

Detailed Description ❸

Provide as much detail as possible to help speed up resolution

📎 ❹

❺
Create Case

Figure 3

Case Type *

Select the most relevant case type

ACCOUNTS PAYABLE (1)

Payment Inquiries

Can include questions regarding Stop payments and stipends for goods and services

ACCOUNTS RECEIVABLE & CUSTOMERS (1)

Banking Information Request

Figure 4

![One RF logo - One System. One Foundation.]

5. **Figure 5 below** is a sample of a case form created. After completing the case form, click **Create Case** ❶.

Figure 5

6. After clicking **Create Case** ❶ in **Figure 5 above**, a new pop-up box will appear, as shown in **Figure 7** below, stating that the **Case Created**. You can choose **My Cases** ❶ to view all your cases or **View Case** ❷ to view the case just entered.

Figure 6

If you click on **View Case ❷** in **Figure 6**, on **Page 3**, **Figure 7** will appear below.
You have **Case Details ❶**, **Case Overview ❷**, and you can **Send a Message ❸**.
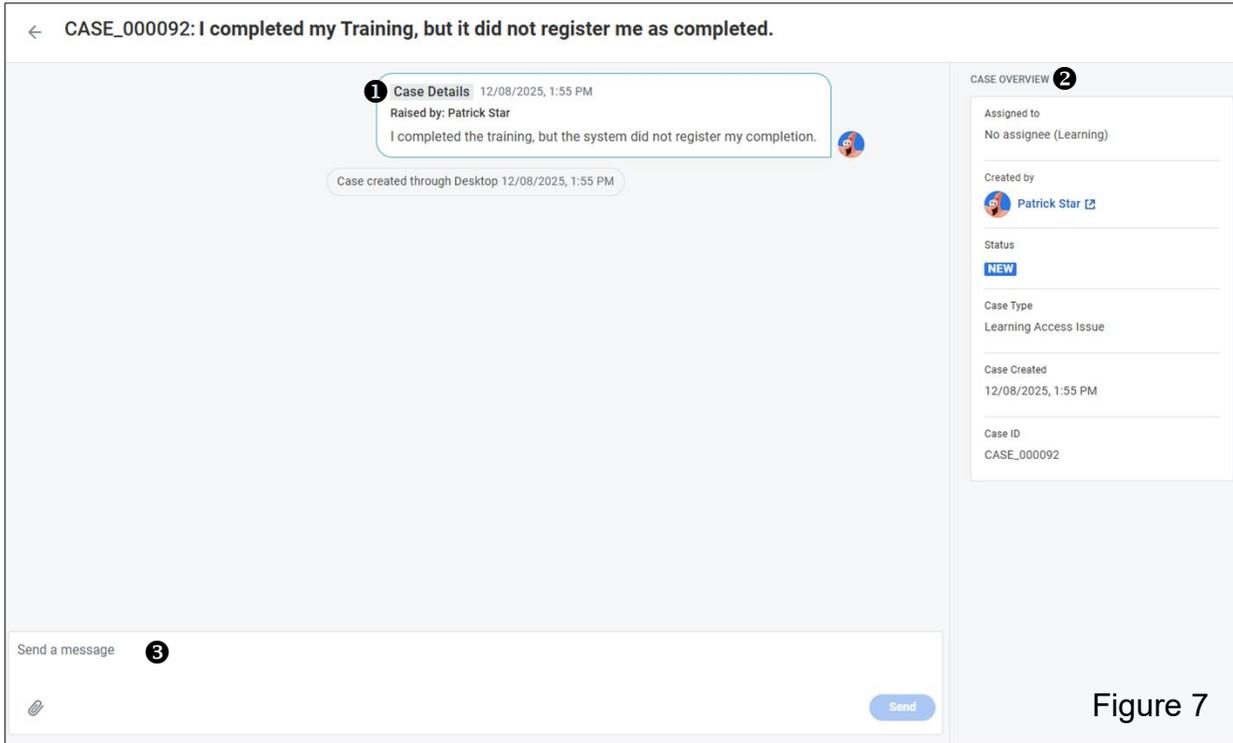

Figure 7

7. Next, we will review the **Case History ❶** from **Figure 2**, on **Page 1**. When you click **Case History**, the **Case History** pop-up box will appear as shown in **Figure** 8 below.
Click on the drop-down menu ❶ ☰ will open **Figure 9**.
Choose your case and click **OK ❸** ın **Figure 8**.

Figure 8

Figure 9

8. After clicking **OK ❸** in **Figure 8**, **Page 4**, the **Case History** screen will appear as shown below in **Figure 10**. This is the audit trail. If you click on the **Case Hyperlink ❶**, the **View Case** screen for the case you're reviewing will appear as shown in **Figure 11**.

Figure 10

9. After clicking on the **Case Hyperlink ❶**, in **Figure 10 above**, the View Case screen will appear as shown below in **Figure 11**. You can view **Case Detail**s **❶**, **Audit Trail ❷**, **Case Overview ❸**, **Complete a Survey ❹** and **Create a New Case ❺** if required.

Figure 11

10. Next, we will review the **View Case** ❷ from **Figure 2**, on **Page 1**. When you click **View Case**, the **Case History** pop-up box will appear as shown in **Figure 12** below. Click on the drop-down menu ❶ ☰ will open **Figure 13**. Choose your case and click **OK** ❸ in **Figure 13**.
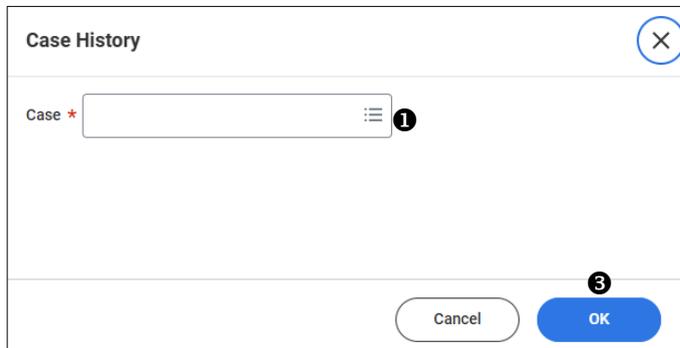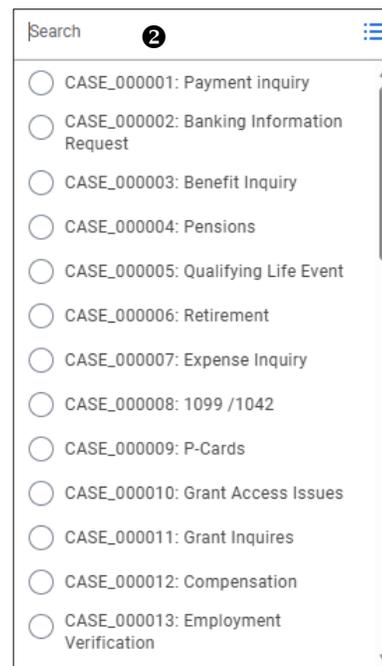
View Case   🔖 ✕

Case * [☰] ❶

                              Cancel   OK ❸

Figure 12

Search   ❷   ☰

○ CASE_000001: Payment inquiry
○ CASE_000002: Banking Information Request
○ CASE_000003: Benefit Inquiry
○ CASE_000004: Pensions
○ CASE_000005: Qualifying Life Event
○ CASE_000006: Retirement
○ CASE_000007: Expense Inquiry
○ CASE_000008: 1099 /1042
○ CASE_000009: P-Cards
○ CASE_000010: Grant Access Issues
○ CASE_000011: Grant Inquires
○ CASE_000012: Compensation
○ CASE_000013: Employment Verification

Figure 13

11. After clicking on a **Case** ❷, in **Figure 13 above**, the **View Case** screen will appear as shown below in **Figure 14**. You can view **Case Detail**s ❶, **Audit Trail** ❷, **Case Overview** ❸, **Complete a Survey** ❹ and **Create a New Case** ❺ if required.

← CASE_000003: **Benefit Inquiry**

❶ **Case Details** 10/30/2025, 1:38 AM
Raised by: Patrick Star
Test

Case created through Desktop 10/30/2025, 1:38 AM

❷ Case Assigned by Annette Piecora to Cristian Valdovinos 10/30/2025, 2:00 AM

Status changed to Resolved by Cristian Valdovinos 11/21/2025, 1:37 PM

Case Satisfaction Survey ❹
How was your experience?
☆ Give Feedback

CASE OVERVIEW ❸

Assigned to
👤 Cristian Valdovinos (Benefits) ↗

Created by
👤 Patrick Star ↗

Status
RESOLVED

Case Type
Benefit Inquiry

Case Created
10/30/2025, 1:38 AM

Case ID
CASE_000003

You can't reopen a closed case after 7 days.
Still need help?

Create New Case

Figure 14

12. Next, we will review **View My Case ❹** from **Figure 2**, on **Page 1**. When you click **View My Cases**, the **View My Case** screen will appear as shown in **Figure 15** below. On this screen, you can view the Case, Detailed Messages, Case Type, Case Creation Type, Assigned to, and Case Status. If you click on a case in the **Blue Hyperlink ❶**, **View Case** screen will appear as shown in **Figure 14** on **Page 6**. If you click on **View Help Center ❷** in Blue the Help Center screen will appear as shown in **Figure 16** below.

Case	Detailed Message	Case Type	Case Creation Date	Assigned To	Case Status
CASE_000092: I completed my Training, but it did not register me as completed.	I completed the training, but the system did not register my completion.	Learning Access Issue	12/08/2025 01:55:18 PM		New
CASE_000081: Complaint - Patrick Star		Complaints	11/12/2025 12:46:43 PM		New
CASE_000080: Marriage	Just got married and need to put my partner on my HI	Qualifying Life Event	11/12/2025 12:43:36 PM	Cecilia Patxot	Resolved
CASE_000074: Honorarium ❶	Individual does not have a w-9 for honorarium	Supplier Updates	11/10/2025 10:38:53 AM	Abdramane Sangare	New
CASE_000073: Vendor never received payment	Never received payment	Payment Inquiries	11/10/2025 10:34:46 AM	Ann Marie Sutherland-King	Resolved
CASE_000072: Lost payment	Lost payment to vendor	Payment Inquiries	11/10/2025 10:34:20 AM	Barbara Rose	In Progress
CASE_000071: New Supplier creation help needed	How do i create a new supplier? Please link me to the webpage	Supplier Updates	11/10/2025 10:33:56 AM	Genesis Velez	New
CASE_000070: UPDATE REMITTANCE	NEED HELP UPDATING REMITTANCE	Supplier Updates	11/10/2025 10:33:01 AM	Bernie Almanzar	New
CASE_000044: Comp Question	Here is the comp issue.....	Compensation	10/30/2025 03:03:39 PM	Ebony Brown	Resolved
CASE_000036: Test	test	Employment Verification	10/30/2025 02:13:31 AM		Resolved
CASE_000035: Test		Career	10/30/2025 02:12:35 AM	Jessica Wong	Resolved
CASE_000034: Disciplinary		Disciplinary	10/30/2025 02:12:06 AM		New
CASE_000033: Time Off	Test	Time Off	10/30/2025 01:56:58 AM	Anthony Paradiso	Resolved

Items per page 30 ▾   1-30 of 45 items « ‹ **1** 2 › »
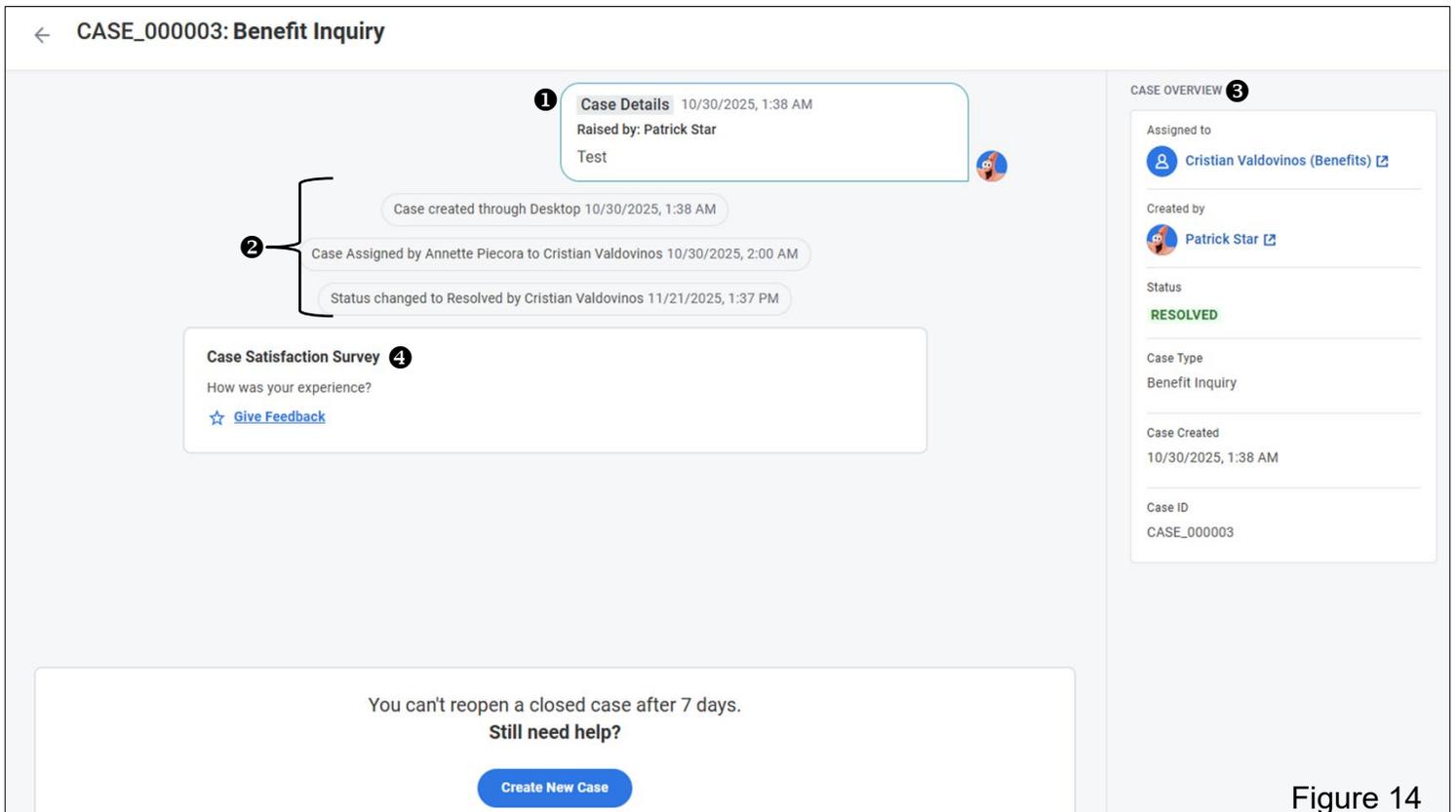
Figure 15

13. After clicking on the **View Help Center ❷** in **Figure 15**, above the Help Center screen will appear as shown in **Figure 16** below**.** You can view **Recent Cases ❶, View My Cases ❷or Create a Case ❸**.

Figure 16