



Reassigning & Forwarding Actions in WiTS

Description: Reassigning and forwarding actions is a way to ensure that actions accessible to the correct person who needs to work on them.

Who Can Reassign and Forward Actions: Every WiTS user with access to the action(s) they seek to reassign and/or forward.

Definitions:

- **Forwarding** an action means you are **sending the action to another user so that they can continue working the action in your place**. Before forwarding, you need to reassign the action to the person you will forward the action to. When you forward an action to another person you are telling WiTS that another person will be completing your step in the process. This may happen when you will be on extended leave, or for any other reason that someone else will be performing your work for a period of time.
- **Reassigning** an action means you are **changing the ownership of the WiTS action** (ex. HRS, HRA, etc). When you reassign an action, you are telling WiTS that a different person will be now be performing the assigned role for the rest of the life of the action. This typically needs to occur when someone is leaving the team and work needs to be distributed to other staff. **When reassigning an action, you will also need to forward the action to the new person so that it will be accessible to them from their worklist.**

Notes:

- Forwarding and/or reassigning is not the same as routing an action. Routing an action means that you are sending that action to the next step of the process (which may, but does not always, mean that you are sending to another person).
- It is important to reassign actions in a timely manner when a staff member departs so that status and workload reporting accurately reflect work assignments.
- Archived or completed actions **cannot** be reassigned or forwarded.

How to Reassign an Action

Action Details Tab

1. Find the action you want to reassign.
 - a. If you are reassigning one of your own actions, it will be on your 'My Worklist' tab.



- b. If you are reassigning another person’s action, you will need to go to the ‘All Branch Actions’ tab to find the action.
2. Open the action.
 - a. If you are opening your own action, simply click on the WiTS number from the worklist and the form will open.
 - b. If you are opening another person’s action, click on the WiTS number, checkmark the box of the last activity on the list, and click ‘Complete’. This will open the form.

Process Instances Detail

Name
Status
Urgency
Check Password
Deadline

Process ID 39916
Custom ID
Initiator Rivera
Initiated Date 06/27/2019 02:59:32 PM
Description ...move an employee into or out of a position, such as a Promotion, assignment, Detail, Change to Ver Grade, etc.

Click on the WiTS number from the worklist and the form will open.

Checkmark the box of the last activity on the list, and click ‘Complete’ to open the action’s form.

Worklist Activity Attachment Discussion Custom Attribute

View all process activities in chronological order.

ID	Status	Activity	Completed By	Participant	Created Date	Completed Date	Repair Work Item
<input checked="" type="checkbox"/>	101	Created HRS Reviews Action		Rivera	06/27/2019 02:59:32 PM		

3. On the ‘Action Details’ tab, select the name of the new person who will handle the action.

CSD Branch Chief*:	<input type="text"/>	CSD Team Leader*:	<input type="text"/>
CSD HR Specialist*:	<input type="text"/>	CSD HR Assistant*:	<input type="text"/>
Final Authorizer*:	<input type="text"/>	Last Saved/Updated:	<input type="text"/>
		By:	<input type="text"/>

4. Save the Action using the routing menu at the top of the form.
5. The action has now been *Reassigned*.

How to Forward an Action

1. Select the action(s) you wish to Forward-

- 1) If you are selecting an action from your ‘My Worklist’ tab, check the box next to the action(s) and click on the ‘Forward’ button located at the top of the action list.



- a) *Note- You can forward more than one action at a time by checking the box of all applicable actions. All selected actions should be reassigned before forwarding.

Indic...	WITS #	Action Type	HRS	HRA	Team Leader	Date Recd	IC	Org Initials	First Name	Last Name	Pos. Title	PPlan
<input checked="" type="checkbox"/>	39801	Change in Wo...	Petersen, Mie...	Rivera, Kim	Shahparast-Af...	05/08/2019 11...	Test	Play/Testing B...	Terronn	Verge	Supvy HR Spe...	GS

- 2) If you are selecting an action from any other tab, click on the WiTS number, checkmark the box of the last activity on the list, and click 'Forward'.
- 3) *Note- You can only forward one action at a time when the action is not in your worklist.

My Worklist | All Branch A Actions

WiTS Video Tutorials

Active A

WITS #	WITS Process	Priority
<input checked="" type="checkbox"/>	Job Code / Position Number	High
<input type="checkbox"/>	Job Code / Position Number	High
<input type="checkbox"/>	Classification	High

Process Instances Detail

Name Job Code / Position Number

Status Running

Urgency Normal

Check Password Unchecked

Deadline

Process ID 988182

Custom ID

Initiator

Initiated Date 09/18/19 09:19:15 AM

Description ...submit a request to create, modify or activate a Job Code and/or Position Number.

Click on the WiTS number from the worklist and the form will open.

Checkmark the box of the last activity on the list, and click 'Forward' to open the action's form.

Worklist | Activity | Attachment | Discussion | Custom Attribute

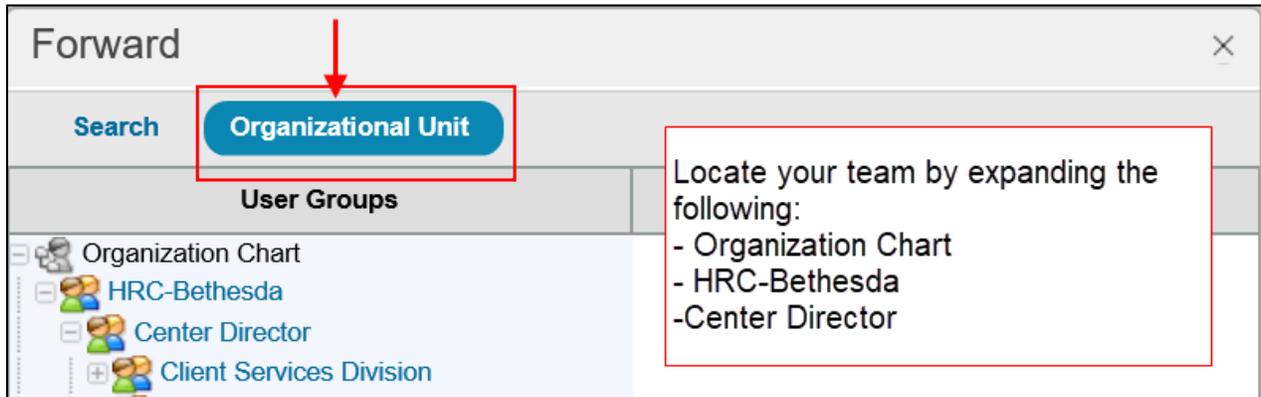
View... Complete... Forward... Monitor...

View all process activities in chronological order.

ID	Status	Activity	Completed By	Participant	Created Date	Completed Date	Repair Work Item
<input checked="" type="checkbox"/>	101	Created	JC/PN Requestor		09/18/19 09:19:15 AM		



Forward Box

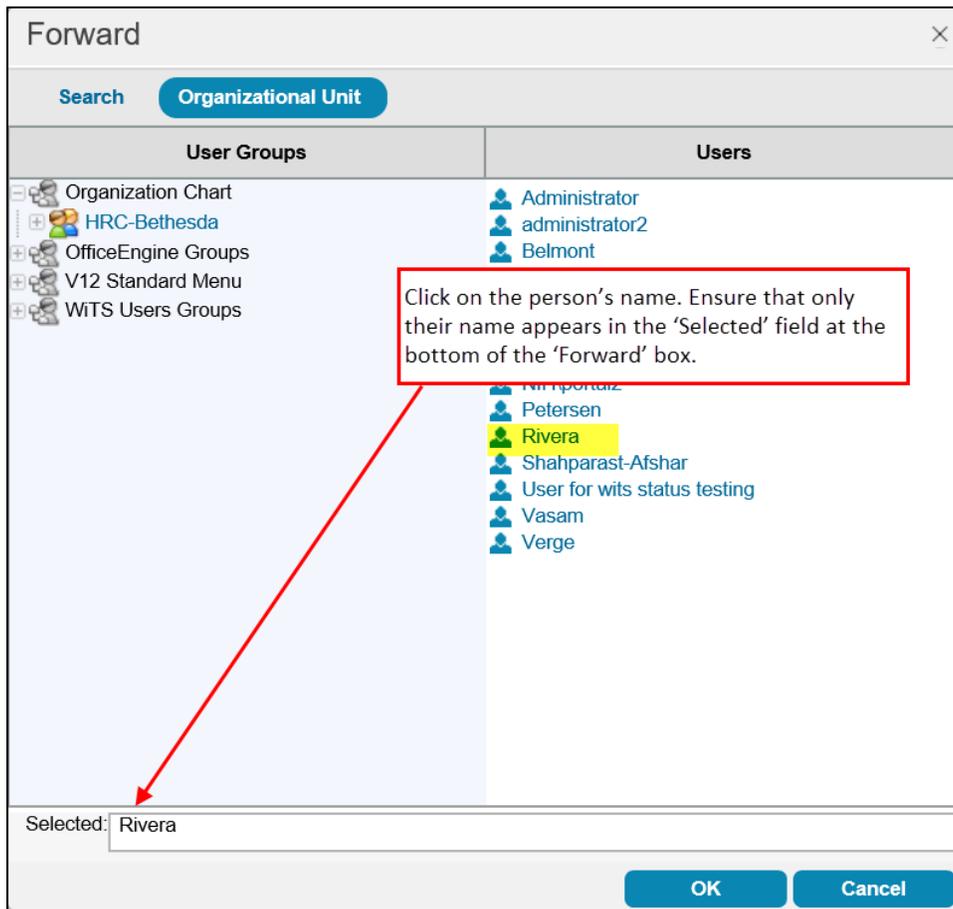


3. Inside the 'Forward' box, click on 'Organizational Unit' and expand the plus signs of the following, to locate the appropriate OHR division/team of the person you will forward your action to:

- Organization Chart
- HRC-Bethesda
- Center Director

4. Once you've located the correct OHR division/team, continue to expand the list until you find the name of the person you want to forward your action to.

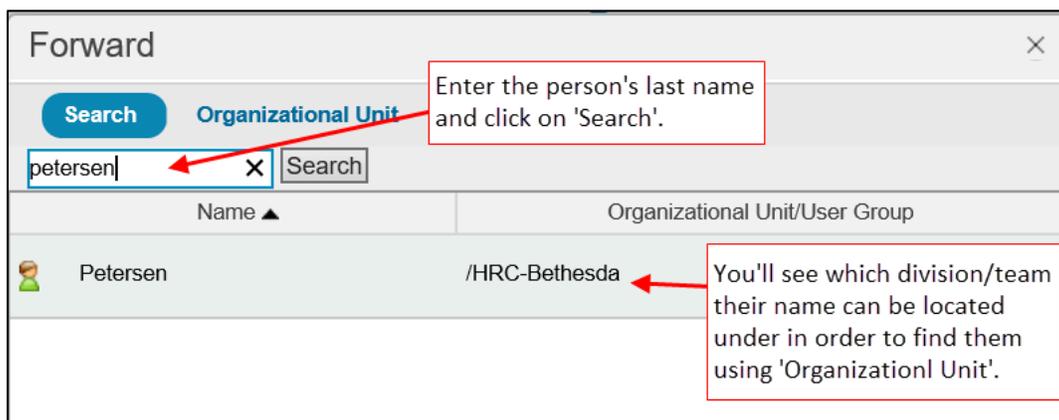
5. Click on the person's name. **Ensure that only their name appears in the 'Selected' field at the bottom of the 'Forward' box.**



6. Click 'OK' and your action will be forwarded!

Having trouble finding the name of the person you are trying to forward your action to?

In the 'Forward' box, click on 'Search' and type in the person's last name. When their name appears, you can see which division/team their name can be found .





Email Notifications

When an action is forwarded, it **may** send an email to notification to the new owner to notify them that a new item is in their worklist.

For more information, visit our [Email Library](#).

Video Tutorials

No videos currently available.

For more information, visit our [Video Library](#).

Need more than a video? You can request training- Submit an [HRSS ticket](#) (Get Help with an HR System), select Issue Category: WiTS-Training Request, and someone from the WiTS Project Team will contact you!