



Reassigning and Forwarding Actions of Employee and Labor Relations Users

Reassigning and forwarding Employee and Labor Relations (ER/LR) actions is necessary when an employee will no longer be responsible for the actions they are assigned. This is only required for active actions. Closed or Archived actions will not be reassigned or forwarded.

Examples of when reassigning and forwarding actions is required:

- An employee is leaving the Workforce Relations Division/Employee and Labor Relations Branch or they will no longer track ER/LR actions in WiTS.
- An employee is moving from one ER/LR Team to another and their active workload is being transferred.
- An employee's active ER/LR actions are being redistributed for any reason.

Terms to Know

- **Reassign:** To name another individual for a particular role on a WiTS action. *For example, changing the ER Specialist on an ER Case action.*
- **Forward:** To move a WiTS action from one person's worklist to another's person's worklist.
- **My Active [ER or LR] Worklist:** A section on an employee's WiTS Work Area Page that contains all of their active ER or LR actions. *ER and LR actions are stored on separate WiTS pages.*
- **Active [ER or LR] Actions (Team [X]):** A section on an employee's WiTS Work Area Page that contains all of their team's active ER or LR actions. *ER and LR actions are stored on separate WiTS pages.*



Contact the WiTS Team via an HR Systems Support ticket if you require help or if you have a high number of actions that need to be reassigned. In some cases, the WiTS Team may be able to reassign actions automatically. The WiTS Team cannot forward actions automatically. That process must be done manually.

Steps to Reassign and Forward Your Actions

The ideal situation is to reassign and forward your actions prior to your departure or position change. Please see the [Steps to Reassign and Forward Someone Else's Actions](#) section of this guide if you need to complete this process for another individual.

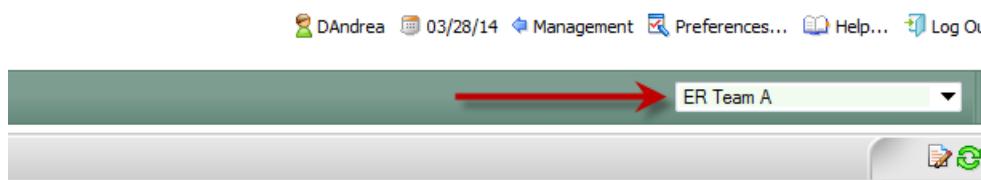


The steps below need to be repeated for Labor Relations actions, if applicable.

Obtaining a list of the active actions in your Worklist

Following these steps will return a list of all active actions in your worklist. These are actions that are currently assigned to you and are in your possession in WiTS. These need to be reassigned and forwarded.

1. Select your ER Team workarea page in the upper-right hand corner of your WiTS page.



2. Access the 'My Active ER Worklist' section of your WiTS page.
3. Click on the 'Export List to Excel' button. *Only exports the first 400 actions.*
4. A dialog box will appear, click 'Open.' You may receive an error message when opening the file, if so, click 'Yes.'
5. Save the Excel file somewhere you can access it later.



You now have a complete list of actions in your worklist. Go to step 6 to reassign the actions.

My Active ER Worklist												
▲ Case #	Date Initiated	Action Type	Case Type	Issue	Employee First Name	Employee Last Name	Position Title	Pay Plan	Series	Grade	IC	ER Specialist
<input type="checkbox"/>	28802 08/05/13 02:48:49 PM	ER Consultation	CS - Conduct	Draft Documents	SAMANTHA	LUBEL					OD - OHR	DAndrea, Michael
<input type="checkbox"/>	28842 08/06/13 03:12:16 PM	ER Consultation	CS - Conduct	Basic training	MICHAEL	D ANDREA					OD - OHR	DAndrea, Michael
<input type="checkbox"/>	28845 08/06/13 03:48:09 PM	ER Consultation	CS - Conduct	Guidance	NICHOLAS	CAGE					OD - OHR	DAndrea, Michael
<input type="checkbox"/>	28924 08/09/13 03:15:26 PM	ER Case	Conduct	Inappropriate use of government property , Inappropriate use of government time , Inappropriate use of government vehicle, Inappropriate use of information technology	MICHAEL	D ANDREA	Human Res Spec[Info Sys/Class]	GS	0201	13	OD - OHR	DAndrea, Michael
<input type="checkbox"/>	28960 08/14/13 12:20:56 PM	ER Case	Conduct	AWOL, Confidential information - Failure to protect and/or disclosure	MARTHA	STEWART	Maintenance Mechanic Leader	WL	4749	11	OD - OHR	DAndrea, Michael
<input type="checkbox"/>	29062 08/26/13 02:07:43 PM	ER Case	Performance	Performance - (2)	NICHOLAS	CAGE	Senior Investigator	AD	1320	00	OD - OHR	DAndrea, Michael
<input type="checkbox"/>	29169 09/13/13 12:03:59 PM	ER Case	Other	Grievance	MICHAEL	D ANDREA	Human Res Spec[Info Sys/Class]	GS	0201	13	OD - OHR	DAndrea, Michael

Quick Search:

Reassigning the Action

Following these steps will reassign the action to another individual.

6. Access the Excel workbook that you obtained in step 5.
7. Locate an action on the Excel workbook that needs to be reassigned.
8. From 'My Active ER Worklist', enter the WiTS number (Case or Consultation number) into the Quick Search box and then click on the filter icon.

Case #	Date Initiated	Action Type	Case Type	Issue	Employee First Name	Employee Last Name	Position Title	Pay Plan
28802	08/05/13 02:48:49 PM	ER Consultation	CS - Conduct	Draft Documents	SAMANTHA	LUBEL		
28842	08/06/13 03:12:16 PM	ER Consultation	CS - Conduct	Basic training	MICHAEL	D ANDREA		
28845	08/06/13 03:48:09 PM	ER Consultation	CS - Conduct	Guidance	NICHOLAS	CAGE		
28924	08/09/13 03:15:26 PM	ER Case	Conduct	Inappropriate use of government property Inappropriate use of government time Inappropriate use of government vehicle, Inappropriate use of information technology	MICHAEL	D ANDREA	Human Res Spec(Info Sys/Class)	GS
28960	08/14/13 12:20:56 PM	ER Case	Conduct	AWOL, Confidential information - Failure to protect and/or disclosure	MARTHA	STEWART	Maintenance Mechanic Leader	WL
29062	08/26/13 02:07:43 PM	ER Case	Performance	Performance - (2)	NICHOLAS	CAGE	Senior Investigator	AD
29169	09/13/13 12:03:59 PM	ER Case	Other	Grievance	MICHAEL	D ANDREA	Human Res Spec(Info Sys/Class)	GS

Quick Search: 26529  Open Selected Action... Monitor Selected Process... Forward to Another User... Export List to Excel...

9. Open the action by clicking on the WiTS number or by placing a checkmark in the box next to the WiTS number and clicking on the 'Open Selected Action' button.

Case #	Date Initiated	Action Type	Case Type	Issue	Employee First Name	Employee Last Name
26529	09/20/12 12:14:34 PM	ER Case	Conduct	Inappropriate use of government property	TERRONN	VERGIL

Filtered search result. [Clear Search Filter](#)

Quick Search: 26529  Open Selected Action... Monitor Selected Process... |

10. Once the action opens, select the individual in either the ER Specialist or ER Team Leader drop down menus who will be assigned the action.

ER Branch Chief*:	<input type="button" value="Lesiw, Roman"/>	ER Team*:	<input type="button" value="Team A"/>
ER Specialist*:	<input type="button" value="DAndrea, Michael"/>	ER Team Leader*:	<input type="button" value="McDougal, Eugene"/>

11. In the top left corner of the action, click the Save icon. This will close the action.



You have successfully reassigned the action to another individual. Go to step 12 to forward the action to them.

Forwarding the Action

Following these steps will forward the action to another individual's worklist.

12. Follow step 8 in the previous section to locate the action using the Quick Search feature.

13. Place a checkmark in the box next to the WiTS number and then click on the 'Forward to Another User' button.

The screenshot shows a table titled 'My Active ER Worklist'. A row is selected, indicated by a red arrow pointing to the checkbox in the first column. The selected row contains the following data: Case # 26529, Date Initiated 09/20/12 12:14:34 PM, Action Type ER Case, Case Type Conduct, Issue Inappropriate use of government property, Employee First Name TERRONN, Employee Last Name VERGE, and Position Lead HR Spec. Below the table, there is a search bar with 'Quick Search: 26529' and a 'Forward to Another User...' button highlighted with a red arrow.

The 'Forward Work Item – Webpage Dialog' box will open.

14. Click on 'Organizational Unit' at the top of the dialog box. *The WiTS Team does not recommend using the 'Search' feature. Doing so increases the likelihood of forwarding an action to the wrong individual.*

15. Locate the employee by expanding the following nodes on the organizational unit tree: *Organization Chart>HRC-Bethesda>Center Director>Workforce Relations Division*

16. Click on the 'Employee/Labor Relations Team' link. *A list of users will appear. Click on the individual who should receive the action.*

17. The individual's name will appear in the 'Selected' field. Click the 'OK' button. You will receive a confirmation pop-up, click 'OK.'

The screenshot shows the 'Forward Work Item -- Webpage Dialog' window. The 'Organizational Unit' tab is selected, indicated by a red arrow. On the left, there is a tree view of the organizational chart. A red arrow points to the 'Employee/Labor Relations Team' node, which is expanded. On the right, there is a list of users. A red arrow points to the user 'McDougal', who is selected in the list. At the bottom, there is a 'Selected:' field containing 'McDougal' and two buttons: 'OK' and 'Cancel'.



You have successfully reassigned and forwarded the action to another individual. Repeat steps 6-17 for each action that needs to be reassigned and forwarded.

Steps to Reassign and Forward Someone Else's Actions

The steps in section outline the process to reassign and forward someone else's actions. In order to complete these steps, you must have access to the same Team(s) as the individual.



The steps below need to be repeated for Labor Relations actions, if applicable.

Obtaining a list of the active actions

Following these steps will return a list of all active actions (where the individual is listed as either an ER Specialist or ER Team Leader).

1. Access the ER Report List and Select the 'ER Status Report'
2. Run the report using the following parameter selections
 - o Status of Actions = 'Active'
 - o Generate Report By = 'Date Received in HR'
 - o Start and End Date: Go back two-years and forward one-year
 - o ER Team = 'All'
 - o Action Type = 'All'
 - o IC = 'All'
 - o Search Admin Code = 'Exact' and 'All'
 - o Display By = (either ER Specialist or ER Team Leader)
 - o ER Specialist or ER Team Leader = [Person's Name]
3. Click 'Generate Report'

The screenshot shows the WiTS Reports interface with the 'ER Status Report' selected. The parameters are as follows:

- Status of Actions: Active
- Generate Report By: Date Action Received in HR
- Start Date: 3/28/2012
- End Date: 3/28/2015
- ER Team: ALL
- Action Type: ALL
- IC: ALL
- Search Admin Code: Exact
- Display By: ER Specialist
- ER Team Lead: ALL
- ER Specialist: Holloway, Lanetta

Annotations explain the settings:

- Select Active actions and Date Action Received in HR
- Go back two-years and forward one-year
- Select All ER Teams, All Action Types, All ICs, and leave the Search Admin Code filter as 'Exact' and 'All'
- Select either ER Specialist or ER Team Leader in the Display By (depending upon the individual's role in the organization), then select the individual.

- Once the report generates, export the data into Excel and save the file somewhere you can access it later. See the [Exporting and Printing WiTS Reports](#) guide if you are not familiar with exporting reports.



You now have a complete list of actions for the individual. Go to step 5 to reassign the actions.

Reassigning the Action

Following these steps will reassign the action to another individual.

- Access the Excel workbook that you obtained in step 4.
- Locate an action on the Excel workbook that needs to be reassigned.
- From the 'Active ER Actions (Team [X])' section, enter the WiTS number (Case or Consultation number) into the Quick Search box and then click on the filter icon.
- Open the action by clicking on the WiTS number.

Active ER Actions (Team A)							
Case #	Date Initiated	Action Type	Case Type	Issue	Employee First Name	Employee Last Name	Position Title
29490	12/05/13 07:52:05 AM	ER Case	Conduct	Discourteous/inappropriate behavior, Eth Ics, Failure to follow directions/instructions	MICHAEL	D ANDREA	Human Res Spec(Info Sys/Class)

Filtered search result. [Clear Search Filter](#)

Quick Search: 29490

[View Action Detail...](#) [Monitor Selected Process...](#) [Export List to Excel...](#)

- The action will open in the 'Details' view of the action.
 - Place a checkmark in the last row or ID column
 - Then click the 'Complete' icon. This will open the action.

Name	UAT - Employee Relations Case	Process ID	29490
Status	Running	Custom ID	
Urgency	Normal	Initiator	DAndrea
Check Password	Unchecked	Initiated Date	12/05/13 07:52:05 AM
Deadline		Description	Use this workflow to initiate and track ER cases.

Worklist						
ID	Status	Activity	Completed By	Participant	Created Date	Repair Work Item
<input checked="" type="checkbox"/> 101	Partially Completed	ERS Creates Action	DAndrea	DAndrea	12/05/13 07:52:05 AM	

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

10. Once the action opens, select the individual in either the ER Specialist or ER Team Leader drop down menus who will be assigned the action.

ER Branch Chief*:	Lesiw, Roman	ER Team*:	Team A
ER Specialist*:	DAndrea, Michael	ER Team Leader*:	McDougal, Eugene

11. In the top left corner of the action, click the Save icon. This will close the action.



You have successfully reassigned the action to another individual. Go to step 12 to forward the action to them.

Forwarding the Action

Following these steps will forward the action to another individual's worklist.

After clicking 'Save' you should be brought back to the 'Details' view of the action; if not, repeat steps 7 and 8 in the previous section.

12. From the 'Details' view, ensure that a checkmark is placed in the last row or ID column and then click the 'Forward' icon.

Name	UAT - Employee Relations Case	Process ID	29490
Status	Running	Custom ID	
Urgency	Normal	Initiator	DAndrea
Check Password	Unchecked	Initiated Date	12/05/13 07:52:05 AM
Deadline		Description	Use this workflow to initiate and track ER cases.

Worklist	Activity	Attachment	Comment	Custom Attribute			
					Forward...	Monitor...	Print
ID	Status	Activity	Completed By	Participant	Created Date	Repair Work Item	
<input checked="" type="checkbox"/> 101	Partially Completed	ERS Creates Action	DAndrea	DAndrea	12/05/13 07:52:05 AM		

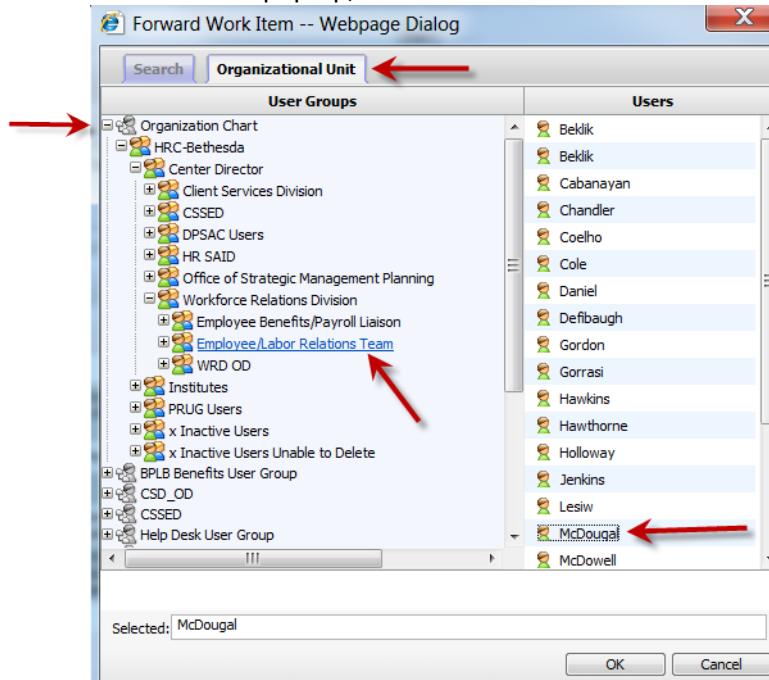
The 'Forward Work Item – Webpage Dialog' box will open.

13. Click on 'Organizational Unit' at the top of the dialog box. *The WiTS Team does not recommend using the 'Search' feature. Doing so increases the likelihood of forwarding an action to the wrong individual.*

14. Locate the employee by expanding the following nodes on the organizational unit tree: *Organization Chart>HRC-Bethesda>Center Director>Workforce Relations Division*

15. Click on the 'Employee/Labor Relations Team' link. *A list of users will appear. Click on the individual who should receive the action.*

16. The individual's name will appear in the 'Selected' field. Click the 'OK' button. You will receive a confirmation pop-up, click 'OK.'



You have successfully reassigned and forwarded the action to another individual. Repeat steps 5-16 for each action that needs to be reassigned and forwarded.