Reassigning and Forwarding Actions of Client Services Division Users

Reassigning and forwarding actions is necessary when an employee will no longer be responsible for the actions they are assigned. This is only required for **active actions**. Archived actions will not be reassigned or forwarded.

Examples of when reassigning and forwarding actions is required:

- An employee is leaving the Client Services Division (CSD) or they will no longer track actions in WiTS.
- An employee is moving from one CSD Branch to another and their active workload is being transferred to a different staff member**.**
- An employee's active CSD actions are being redistributed for any reason.

Please Note: Unless directed otherwise by your Branch Chief, the following actions will not need to be assigned when an individual is leaving CSD or moving to another branch.

1. Actions that are with the DE for Final Audit
2. Benefit Actions that have been created from an Appointment

Terms to Know

- **Reassign:** To name another individual for a particular role on a WiTS action. *For example, changing the CSD HR Specialist on an Award action.*
- **Forward:** To move a WiTS action from one person's worklist to another's person's worklist.
- **Worklist:** A section on an employee's WiTS Work Area Page that contains all of their active actions assigned to them.
- **Active WiTS Transactions for [X]:** A section on an employee's WiTS Work Area Page that contains all of their Branch's active actions.

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 Actions not in your Worklist or for Someone Else](#) section of this guide if you need to complete this process for another individual or if you have active actions not in your worklist.

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 both reassigned and forwarded.

1. Select your Branch's workarea page in the upper-right hand corner of your WiTS page.
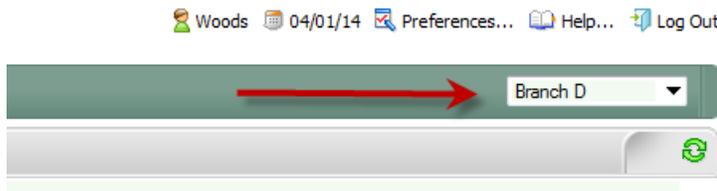
2. Access the 'Worklist' section of your WiTS page.

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.

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 the 'Worklist' section, enter the WiTS number into the Quick Search box and then click on the filter icon.

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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.

WiTS #	Action Type	HRS	HRA	CU Classifier	Date Recd	▼ IC	Org Initials	FName	LName	Pos. Title	PPlan	Series	Grade	Prop. Eff. Date
☐ 24319	UAT - Change in Work Schedule / Hours	Potter, Jennifer	Potter, Jennifer		11/29/11 11:25:30 AM	Test	Play/Testing Branch	Jennifer	Potter	Industrial Hygenist	GS	0690	13	02/12/12

Filtered search result. Clear Search Filter   ◄◄ ◄ 1 ► ►►

Quick Search: 24319   [Open Selected Action...] [Forward to Another User...] [Monitor Selected Process...] [Export List to Excel...]

10. Once the action opens, make the necessary change using the appropriate participant drop down menus. Select the new participant who will be assigned the action. (I.e. if Mike D'Andrea will no longer be the CSD HR Assistant for this action, use the drop down to select the new HR Assistant for this action).

CSD Branch Chief*:   Inala, Madhu ▼   CSD Team Leader*:   D'Andrea, Mike ▼
CSD HR Specialist*:   D'Andrea, Mike ▼   CSD HR Assistant*:   D'Andrea, Mike ▼
CSD SPA*:   Shahparast-Afshar, Negy ▼

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

UAT - LWOP Process - HRS Reviews Action - Windows Internet Explorer

Routing Send Pckg Recd Email ▼ ✓ Complete 💾 Save C Comment 🖨 Print ✖ Exit witho

WiTS
workflow information tracking system

Leave Witho
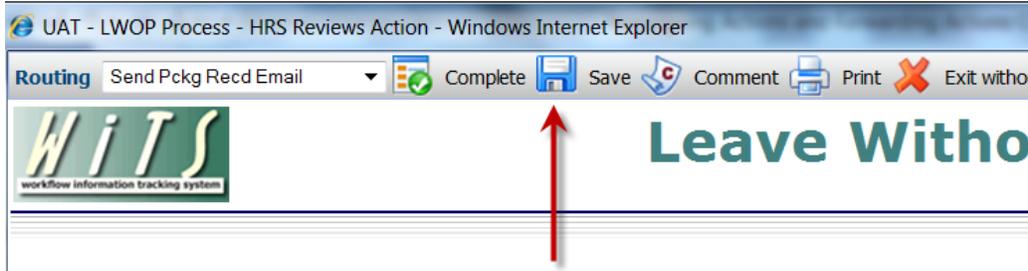
You have successfully reassigned the action to another individual. Go to the Forwarding the Action section if you also need to forward the action.

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.

	WiTS #	Action Type	HRS	HRA	CU Classifier	Date Recd	IC	Org Initials	FName	LName	Pos. Title	PPlan	Series	Grade	Prop. Eff. Date
✓	24319	UAT - Change in Work Schedule / Hours	Potter, Jennifer	Potter, Jennifer		11/29/11 11:25:30 AM	Test	Play/Testing Branch	Jennifer	Potter	Industrial Hygenist	GS	0690	13	02/12/12

Filtered search result. Clear Search Filter

Quick Search: 24319   [Open Selected Action...]   [Forward to Another User...]   [Monitor Selected Process...]   [Export List to Excel...]

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>Client Services Division. If you need to forward an action to someone in a Branch, expand 'Staffing Branches' node.

16. Click on the appropriate location link (e.g., 'Team A') to find the individual. *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.'
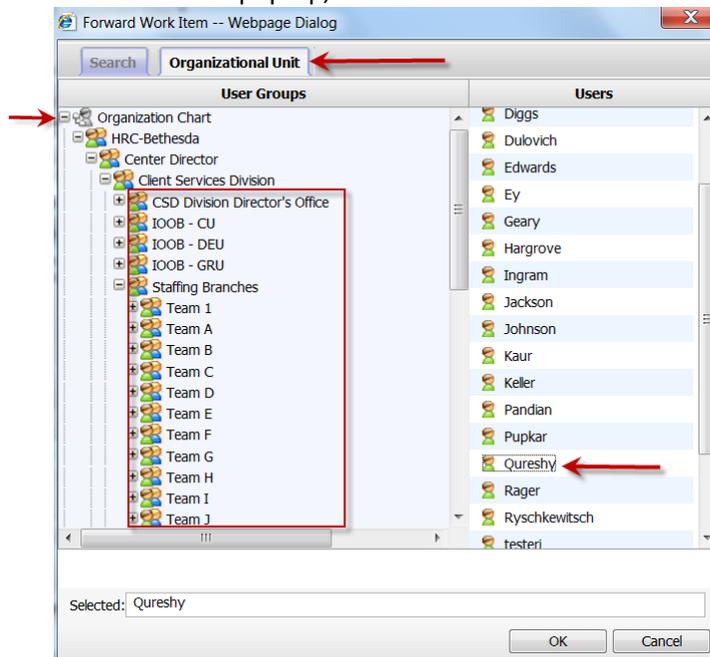
You have successfully reassigned and forwarded the action to another individual. Repeat steps 6-17 for each action that needs to be reassigned and forwarded. Go to the next section if you have active actions that are not in your worklist.

Steps to Reassign and Forward Actions not in your Worklist or for Someone Else

The steps in section outline the process to reassign and forward someone else's actions or active actions that are not in your worklist. In order to complete these steps for another individual, you must have access to the same Branch as them.

Obtaining a list of the active actions

Following these steps will return a list of all active action (with the exception of JCPN actions) where the individual is listed as either an HR Specialist or HR Assistant.

1. Access the CSD Report List and Select the 'Status Report'
2. Run the report using the following parameter selections
3. Status of Actions = 'Active'
4. Generate Report By = 'Date Received in HR'
5. Start and End Date: Go back two-years and forward one-year
6. IC = 'All'
7. Search Admin Code = 'Exact' and 'All'
8. Action Type = 'All'
9. Branch = 'All'
10. Display By = (either HR Specialist or HR Assistant)
11. HR Specialist or HR Assistant = [Person's Name]
12. Priority = 'All'
13. Include Recruitments in the Final Audit Stage = 'No'
14. Click 'Generate Report'

Choose a Report List:		Select Your Report:	
CSD Report List	▼	Status Report	▼

This report provides overview information on actions that have been submitted to HR for review and processing. ❓

Status of Actions:	All ▼	❓
Generate Report By:	Date Action Received in HR ▼	❓
Start Date:	12/4/2012 📅	❓
End Date:	12/4/2015 📅	❓
IC:	ALL ▼	❓
Search Admin Code:	Exact ▼ ALL	❓
Action Type:	ALL ▼	❓
Branch:	ALL ▼	❓
Include GRU Data?	Yes ▼	❓
Display By:	Specialist ▼	❓
HR Specialist:	Verge, Terrye ▼	❓
HR Assistant:	ALL ▼	❓
HR FA:	ALL ▼	❓
Priority:	All ▼	❓
Include Recruitments in the Final Audit Stage:	No ▼	❓

15. 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.

Since JCPN actions will not show up on this report, run the CSD JCPN report to see if there are any active JCPN actions that should be reassigned.

The HR Specialist, HR Assistant, Final Authorizer, Team Leader and Branch Chief are available on the status report when exported to Excel.

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

Reassigning the Action

Following these steps will reassign the action to another individual.

16. Access the Excel workbook that you obtained in step 5.

17. Locate an action on the Excel workbook that needs to be reassigned.

18. From the 'Active WiTS Transactions for [X]' section, enter the WiTS number into the Quick Search box and then click on the filter icon.

19. Open the action by clicking on the WiTS number.
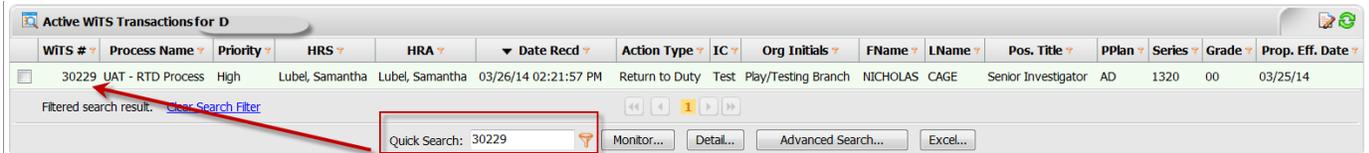
20. The action will open in the 'Details' view of the action.
21. Place a checkmark in the last row or ID column.
22. Then click the 'Complete' icon. This will open the action.
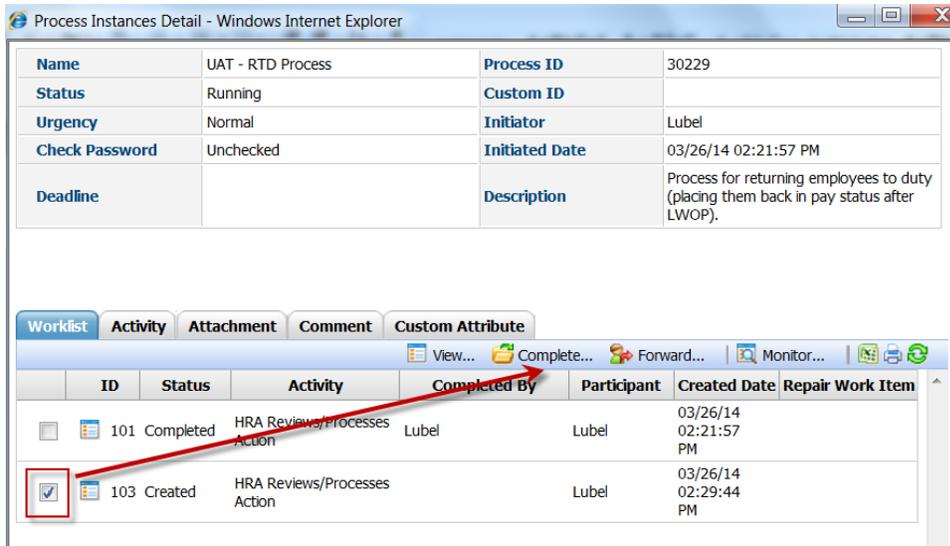
23. Once the action opens, select the individual in either of the roles (e.g., HR Specialist) in the drop down menus who will be assigned the action.

CSD Branch Chief*:	Inala, Madhu
CSD HR Specialist*:	D'Andrea, Mike
CSD SPA*:	Shahparast-Afshar, Negy

CSD Team Leader*:	D'Andrea, Mike
CSD HR Assistant*:	D'Andrea, Mike

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

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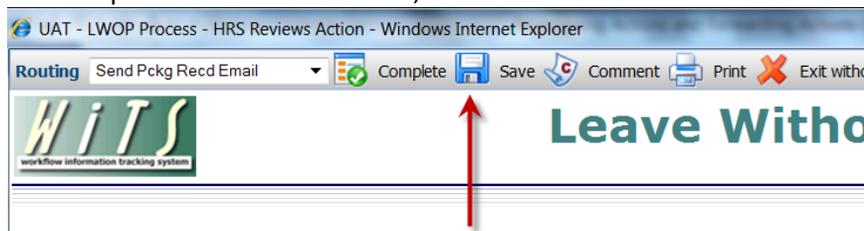
You have successfully reassigned the action to another individual. Go to step 12 to forward the action to them.

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.

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

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

26. 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.

27. Locate the employee by expanding the following nodes on the organizational unit tree: Organization Chart>HRC-Bethesda>Center Director>Client Services Division. If you need to forward an action to someone in a Branch, expand 'Staffing Branches.'

28. Click on the appropriate location link to find the individual. *A list of users will appear.* Click on the individual who should receive the action.

29. The individual's name will appear in the 'Selected' field. Click the 'OK' button. You will receive a confirmation pop-up, click 'OK.'
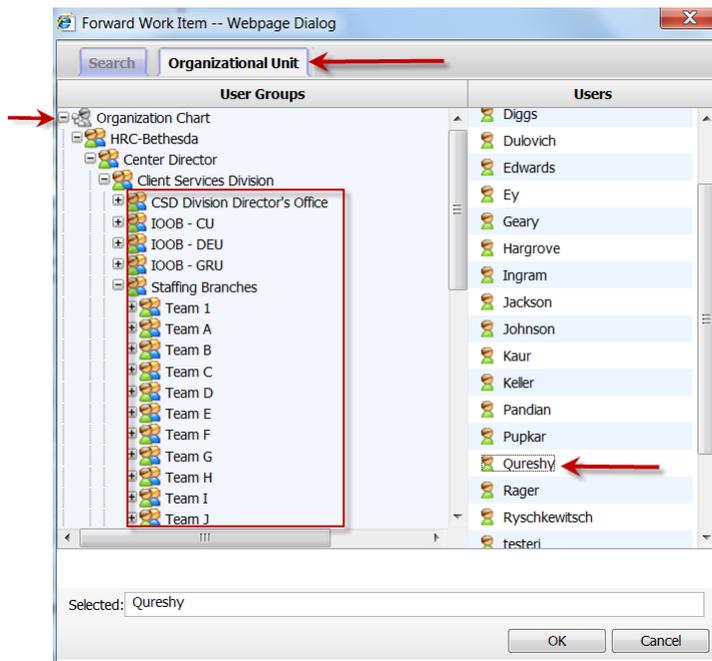
You have successfully reassigned and forwarded the action to another individual. Repeat steps 5-16 for each action that needs to be reassigned and forwarded.