National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

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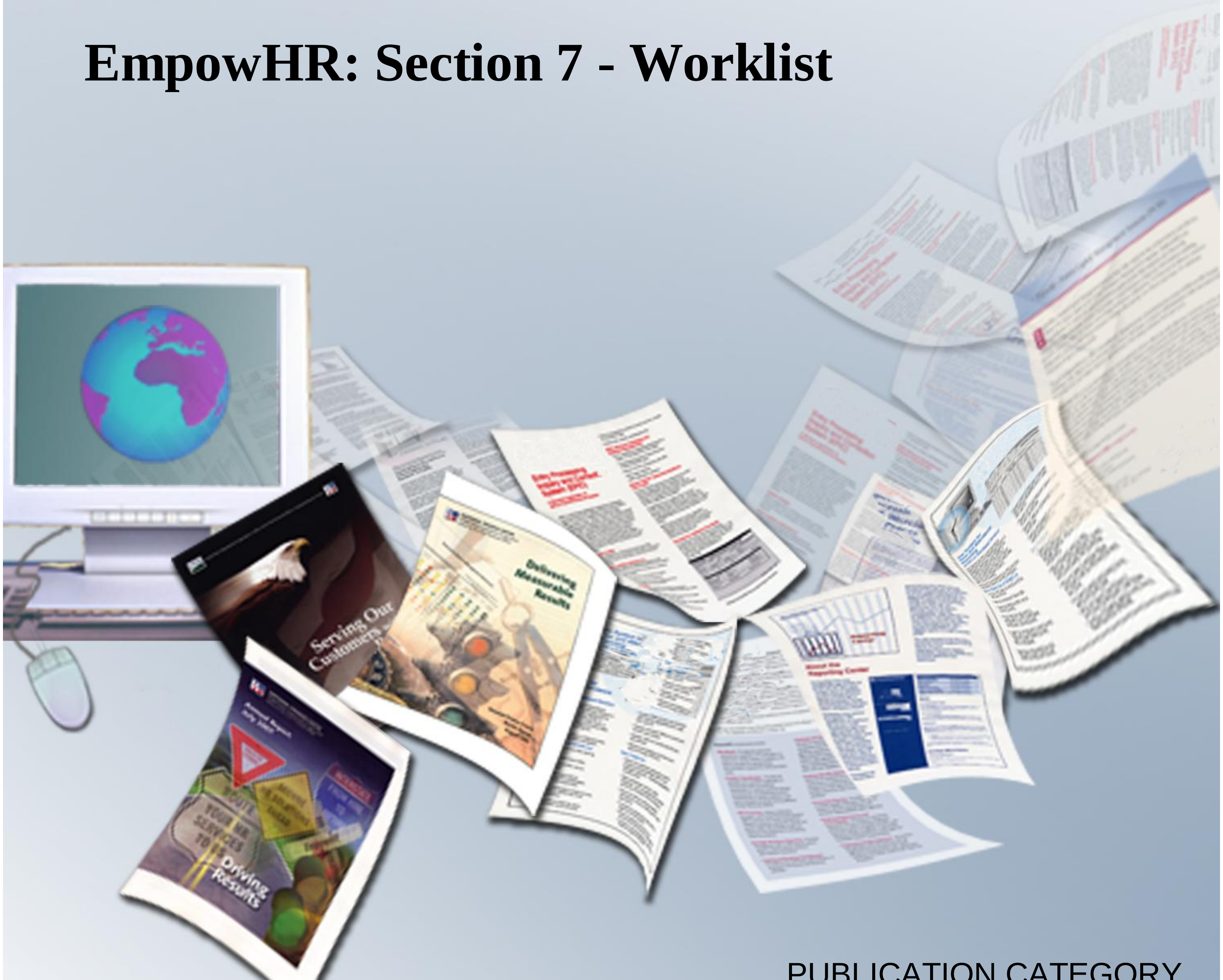
EmpowHR: Section 7 - Worklist



PUBLICATION CATEGORY
HR and Payroll Processing

PROCEDURE MANUAL
EmpowHR

SECTION 7
Worklist

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Latest Update Information

The following changes have been made to the Worklist procedure:

Section	Description of Change
EmpowHR: Section 7 - Worklist	Procedure document has been updated throughout to be accessible with assistive technology according to Section 508 of the Rehabilitation Act.
Administer Work Lists	Name column added to the Administer Worklists page - Worklist Monitor tab.
User Work List Administration	Name and Org Code columns added to the User Worklist Administration page.

Work List

This section provides a description and defines the work list in EmpowHR. The work list contains transactions that are created and/or sent to a specific person (or group) informing them that there are transaction(s) requiring attention. The list contains applied transactions as well as not applied transactions with errors. When the specific transaction is selected, the error message and number are displayed. For information regarding error messages, refer to the Personnel Edit Subsystem (PINE) Edit Messages procedure manual located under the Human Resources and Payroll Processing category on the Publications page on the ***NFC Home Page*** (***http://www.nfc.usda.gov***). Once the Job Code, Position, Personnel Action Request (PAR), or Payroll record is corrected, return to the work list and click **Marked Worked** next to the applicable transaction.

For more information see:

Applied and Not Applied Work List Items

Each time EmpowHR is accessed, the user has the ability to view a status of transactions from the prior day. Actions that go to the National Finance Center (NFC) are displayed on the work list. Select any work list item, and EmpowHR will display the appropriate panel to either view or make corrections.

All types of transactions are displayed on the work list of the person that created it. ***View All SINQ Errors*** and ***View All PRES Errors*** will allow the user to view all of the errors on the selected record. The ***Reassign*** option is used to reassign the item on the work list to another employee.

Work list items displayed as **Not Applied** contain transactions from the following applications:

- EmpowHR
- Web-based Entry, Processing, Inquiry, and Correction System (EPIC Web)
- Employee Personal Page (EPP)
- Bi-weekly Examination Analysis and Reporting System (BEAR)
- Batch numbers beginning with 67

Work list items with error messages must be resolved in EmpowHR. The work list items that originate in EPIC Web are marked for deletion in EPIC Web. If the transaction requires an override code, the transaction must be worked before the end of the pay period and released. At the end of the pay period, the deleted transactions in EPIC Web are removed. A deleted transaction requiring an override code must be re-entered in EPIC Web and released. Once the transaction is edited in PINE, the transaction is again stored and viewed in EmpowHR.

Note: The work list folders for the **`Not Applied Status`** (all types) will be refreshed daily, adding new items to the folder and retaining old items. Delete items from the work list by selecting the item(s) noted by **`Available`** or **`Selected`** if the items have been viewed. Click **Mark Worked** and then **Refresh**.

Action Status

The following items may appear on the user's work list based on how the action cleared NFC PINE edits. This provides a one-stop view of the status of actions.

- **New Action Applied**: A new action applied is an action that did not exist at NFC and has successfully applied to the NFC database. Users' work in Human Resources (HR) Processing from the day before will return to this status folder if the action(s) applied overnight. View the panel or just do a visual of this panel; no further panel action is necessary. It is the user's option to keep these items on the work list. Items may be retained on a work list or deleted from a work list per the above guidance.
- **New Action Did Not Apply**: These items need the user's attention. A new action that did not apply is an action that did not exist at NFC and did not pass the NFC PINE edits. Use the error reports to determine what action may be needed. Note the name of the employee and the Nature of Action Code (NOAC) that did not apply. Click the work list item, and the user will be taken to the employee record that needs to be corrected. Be sure to locate the specific NOAC that needs correction. Take the appropriate action following the EmpowHR Processing Procedures Correction/Cancelation Actions for Non-Applied Actions, in the EmpowHR procedure. Save the record and return to the work list.

  After completing work on the record, retain the item on the work list, or clear the item from the work list by marking the item **Mark Worked** as explained above. If the action clears suspense overnight, it will display in the appropriate status folder the next day.

- **Future Actions**: Currently, actions that are in **`Future`** status at NFC will have a status of **`Not Applied`** in EmpowHR. Future actions will not pass all of the NFC PINE edits until the effective date of that action occurs. The status may be changed from **`Not Applied`** to **`Future`**. You must then mark the work list item as **`Worked`**. This will prevent the action from displaying on the work list everyday as **`Not Applied`**. All **`Not Applied`** actions will be rebuilt each night. The action will display on the work list once the effective date of the action occurs.

- **Cancelation Applied**: This is an action that already exists at NFC that has been successfully canceled. If a **`Cancel NFC Applied Action`** is submitted, it will return to this status if it applied overnight. Retain this item on the work list or delete as stated above.
- **Cancelation Did Not Apply**: This is an action that already exists at NFC and did not pass an attempt to cancel. It did not pass NFC suspense. If canceling an NFC Applied action and it did not apply, it will appear in this status folder. Select the item and make the appropriate corrections. Retain the item on the work list or delete the item from the work list as stated above.
- **Correction Applied**: This is an action that already exists at NFC and has been successfully corrected. If a **`Correct NFC Applied Action`** is submitted, it will return to this status if it applied overnight. Retain this on the work list or delete as stated above.
- **Correction Did Not Apply**: This is an action that already exists at NFC. The attempt to correct this item did not pass NFC suspense. If a correction is made to an **`NFC Applied Action`** and it did not apply, it will appear in this status folder. Select the item and make the appropriate corrections. Retain the item on the work list or clear the item from the work list as stated above.

Note: If the NFC Contact Center or an EmpowHR team member is assisting in correcting a problem with an action or multiple actions and edits, the action(s) will not return to the work list. Manually review those actions the next day to ensure that they have applied.

To View and Modify the Work List

To View and Modify the Work List:

1. Select the ***Worklist*** menu group.

OR

Click the ***Worklist*** link at the top of the header menu. The Worklist for (Name) page is displayed.

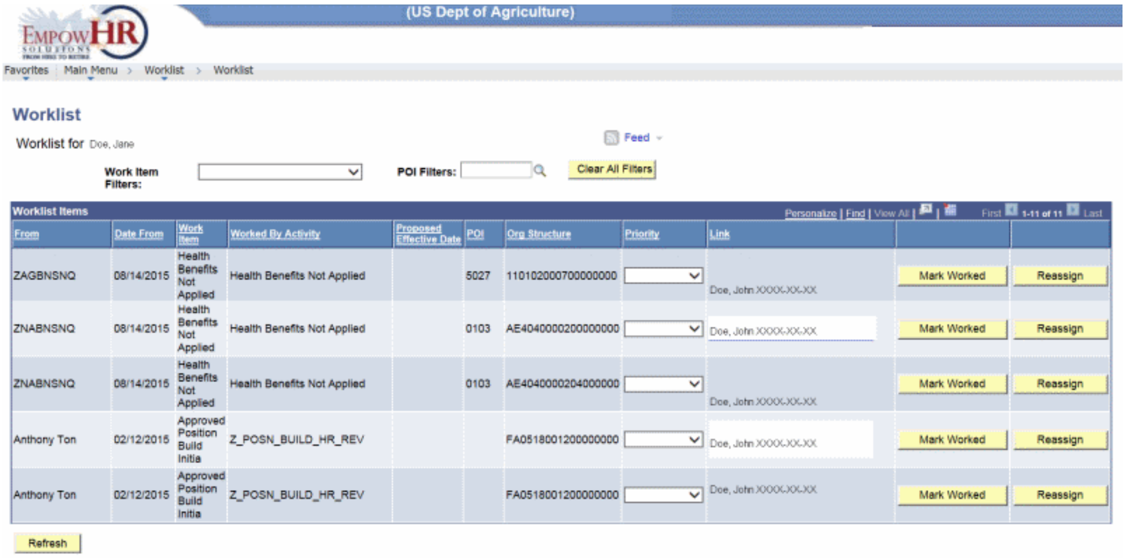

Figure 1: Worklist for (Name) Page

2. Complete the fields as follows:

Field	Description/Instruction
Work Item Filters	Click the down arrow to select (filter) only a certain type of document to be displayed on the work list (i.e., Comp Time Not Applied).
POI Filters	Enter a personnel office identifier (POI) to list only those work list items for a certain POI. You can also click the search icon to select a POI.
Worklist Items	**Description/Instruction**
From	Displays the batch name of the job that processed the transaction to the work list.
Date From	Displays the date the transaction was sent to the work list.
Work Item	Displays the type of transaction and the status of the transaction.
Worked By Activity	Displays the type of transaction and the status of the transaction. (Same information displayed in the Work Item field).
Proposed Effective Date	Contains the proposed effective date of the action if the action is a future action.
POI	Displays the POI for the employee whose action it is.
Org Structure	Displays the organizational structure of the employee.

Field	**Description/Instruction**
Priority	Select a priority for each transaction on the work list. This field is used to set priorities and does not affect another user's work list.
Link	Displays the link to the individual transaction. Click the transaction link to display the transaction. The error links will initially display blue, but will display red once a user has opened the item.
Mark Worked	Once the suspense transaction is worked, enable this field and the transaction will no longer be displayed on the work list.
Reassign	Used to send or reassign the transaction to another user or group.

3. Select a transaction that is marked **`Not Applied`**. The detailed transaction with the **`Not Applied`** status is displayed

4. Click ***View Current SINQ Errors*** or ***View All PRES Errors*** (depending on the type of document selected). The View Current SINQ Errors page (or View All PRES Errors page) is displayed. PAR error messages are listed by Run Date, with the most recent listed at the top.

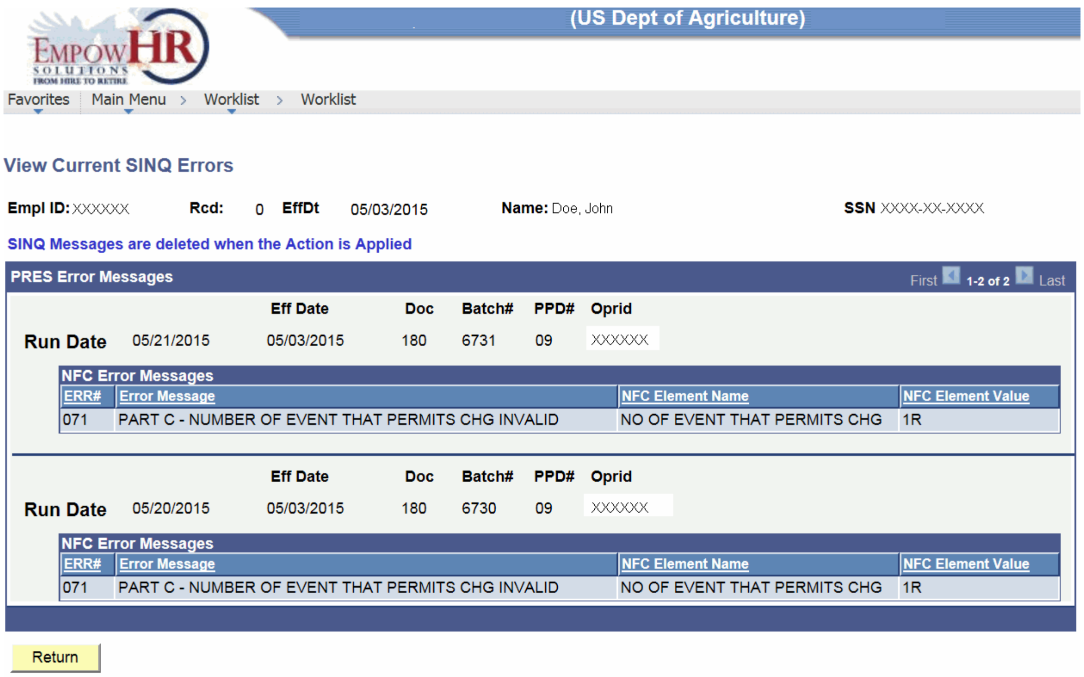

Figure 2: View Current SINQ Errors Page

5. Review the error message(s) listed. Compare the record to the Information Research/Inquiry System (IRIS) to ensure that EmpowHR matches IRIS.

6. Click **Return** to return to the previous page.

7. Edit the action.

8. Click **View Worklist** at the bottom of the page to return to the work list.

9. On the work list, click **Mark Worked** if you have completed the corrective action to be taken. The Transaction status will change to **NFC Ready**.

   OR

   Click **Reassign** to delegate the item to another user. The Reassign page is displayed allowing you to assign the action to another user.

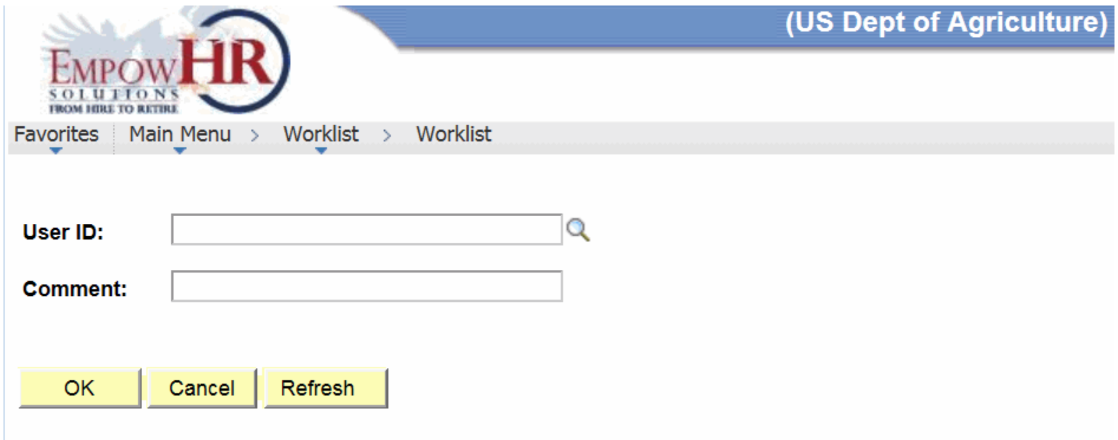

Figure 3: Reassign Page

10. Complete the fields on the Reassign page as follows:

Field	Instruction
User ID	Enter the applicable user ID of the person to whom you want to assign the item or search for the user ID by clicking the search icon.
Comment	Enter any comments, if applicable.

11. Click **OK**. You are returned to the work list. The item that was reassigned is no longer on your work list. It is now on the work list of the person to whom you reassigned the item.

Note: All transactions on the work list must be addressed. Items can be viewed by other personnel in the work group.

Administer Work Lists

The Administer Worklists page - Worklist Monitor tab is used to send notifications about work list items in EmpowHR.

To Send Notifications about Work List Items:

1. Select the ***Worklist Administration*** menu group.

2. Select the ***Administer Worklists*** menu item. The Administer Worklists page - Worklist Search tab is displayed.

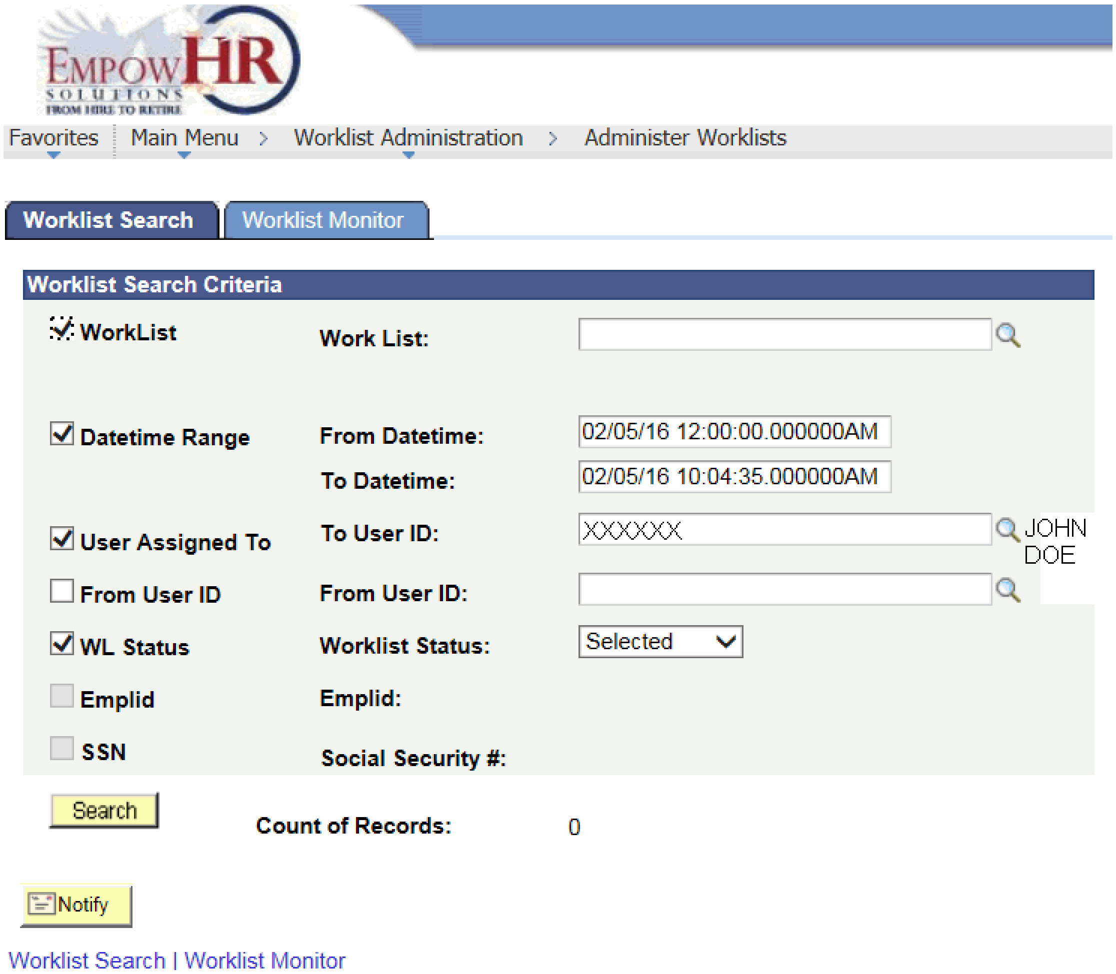

Figure 4: Administer Worklist Page - Worklist Search Tab

3. Select the ***Worklist Monitor*** tab. The Administer Worklists page - Worklist Monitor tab is displayed.

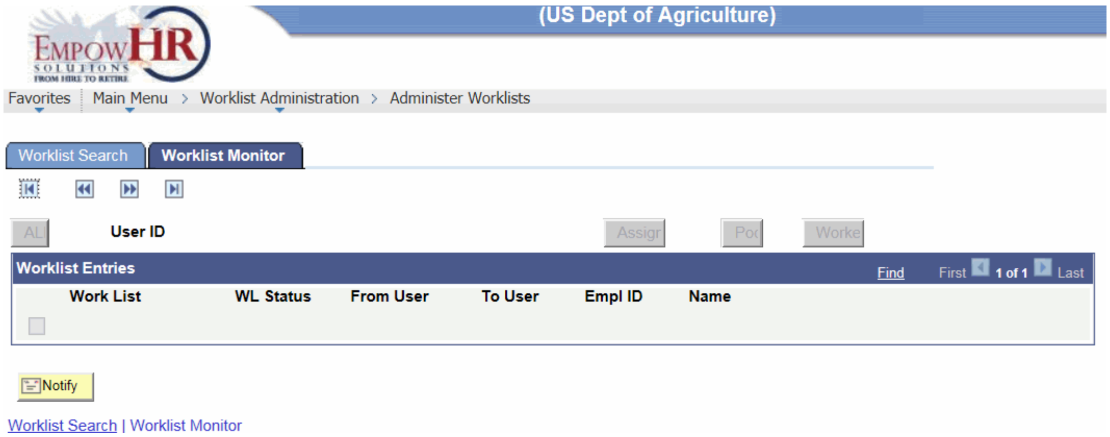

Figure 5: Administer Worklist Page - Worklist Monitor Tab

4. Complete the fields as follows:

Field	Description/Instruction
User ID	Populated with the user ID.
Worklist Entries	**Description/Instruction**
Work List	Check this box to send a notification about the work list item.
WL Status	Populated with the status of the work list item.
From User	Populated with the user ID of the person that the work list item is from.
To User	Populated with name of the person to whom you are reassigning the work list item.
Empl ID	Populated with the Empl ID of the person to whom you are reassigning the work list item.
Name	Populated with the name of the person to whom you are reassigning the work list item.

5. Click **Notify**. The Send Notification page is displayed.

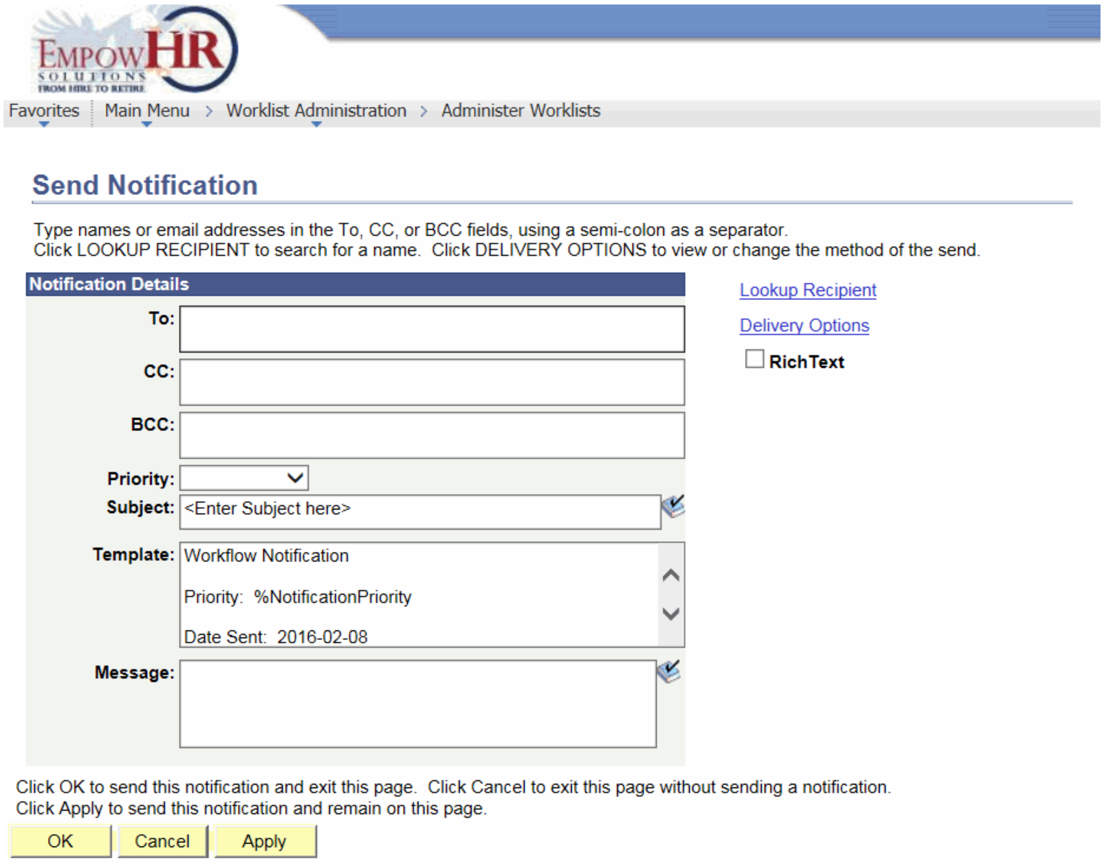

Figure 6: Send Notification Page

6. Complete the fields as follows:

Notification Details	Description/Instruction
To	Type the email address of the recipient of the notification.
CC	Carbon copy. Type the email address of the recipient of a copy of the notification, if applicable.
Rich Text	Check this box to display the rich text options for the notification.
BCC	Blind carbon copy. Type the email address of the recipient of a blind copy of the notification, if applicable.
Priority	Click the down arrow to select the priority level of the notification.
Subject	Type the subject of the notification.
Template	Populated with the information about the notification (i.e., date).
Message	Type the message to be included in the notification.

7. Click **OK** to send the notification. You are returned to the Administer Worklists page - Worklist Monitor tab.

User Work List Administration

The User Worklist Administration page is used to reassign work list items in EmpowHR.

To Reassign Work List Items:

1. Select the ***Worklist Administration*** menu group.

2. Select the ***User Worklist Administration*** menu item. The User Worklist Administration page is displayed.

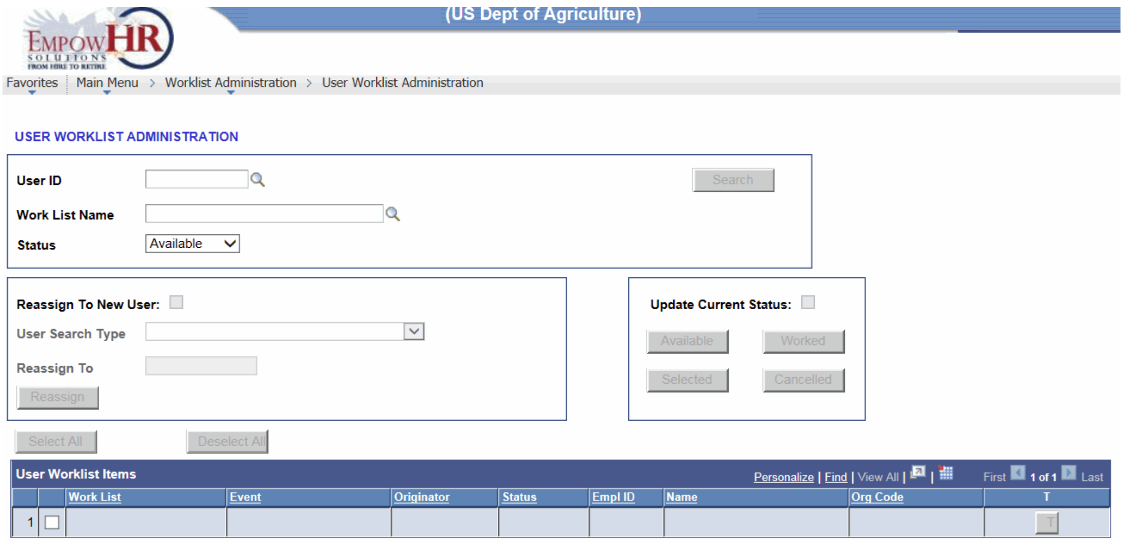

Figure 7: User Worklist Administration Page

3. Complete the fields as follows:

Field	Description/Instruction
User ID	Enter the user ID of the user whose work list item you are reassigning.
Work List Name	Enter the name of the work list item to be reassigned.
Status	Click the down arrow to select the applicable status of the work list item being reassigned.
Reassign To New User	Check this box to reassign the work list item.
User Search Type	Click the down arrow to select the applicable search type.
Reassign To	Enter the name of the person to whom you are reassigning the work list

Field	Description/Instruction
	item.
Update Current Status	Check this box to update the work list item status. If this box is checked, select the applicable status.
User Worklist Items	**Description/Instruction**
Work List	Check this box to select the work list item.
Event	Populated with the work list event information.
Originator	Populated with the work list item originator.
Status	Populated with the status of the work list item.
Empl ID	Populated with the Empl ID associated with the work list item.
Name	Populated with the name associated with the work list item.
Org Code	Populated with the organizational information associated with the work list.

4. Click **Reassign**.

How To Resend a Personnel Action

This feature will allow the reset of the position and resend it to NFC when the Position Data or the Job Code is in suspense or did not apply to the Position Management System Online (PMSO) database at NFC. An example of this would be when an error message (*Master Record not found* and/or *IP not found in the Position Management component*) is displayed.

1. Select the ***Worklist*** menu group.

   OR

   Click the ***Worklist*** link at the top of the header menu. The Worklist for (Name) page is displayed.

2. Under the Link column, select the applicable action.

3. Correct the Job Code and/or Position Data information that is in suspense.

   Note: Ensure the Status is changed to **NFC Ready**. This will reset the position data and the system will resend it to NFC.

4. Select the ***HR Processing*** menu group.

5. Select the applicable employee.

6. Select the ***Data Control*** tab on the Hire Employee page. The Transaction Status will display **`Not Applied`**.

7. Change the Transaction Status to **`NFC Ready`** by selecting data from the drop-down list.

8. Click **Save**. This will reset the personnel action and the application will resend it to NFC.

Note: This should only be used when the Position Data or the Job Code are in suspense or did not apply to the NFC PMSO database. Remember to correct the Position Data or the Job Code first, and then select ***HR Processing*** under ***PAR Processing*** to reset the personnel action.

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