



USER GUIDE

EMPLOYEE/LABOR CONSULTATIONS

The **Employee/Labor Relations Consultation** workflow tracks consulting activities performed by Employee Relations (ER) and Labor Relations (LR) staff. This form/workflow tracks ER and LR related activities such as drafting documents, conducting research, delivering training, and providing guidance. Additionally, this form tracks the work related to 'Other' activities such as EEO requests, CIVIL inquiries, FLRA hearings, and MSPB appeals.

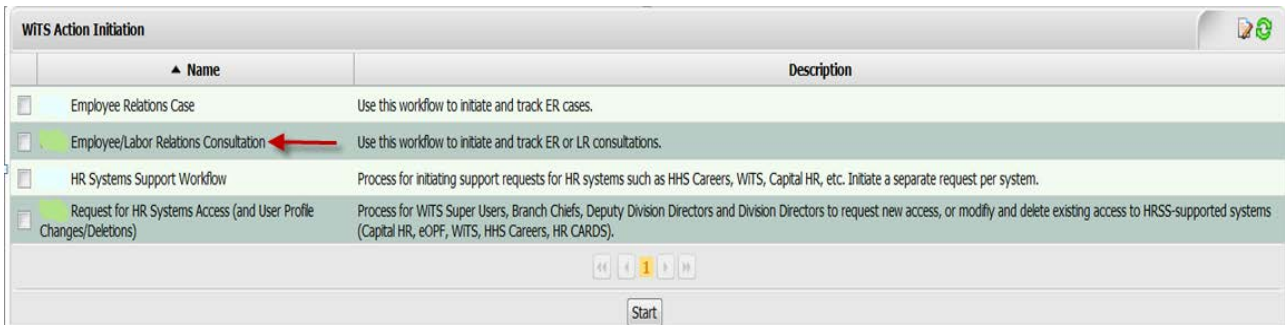
This form/workflow does not track Employee or Labor Relations Case information. Use the Employee or Labor Relations Case form/workflow to track case specific information.

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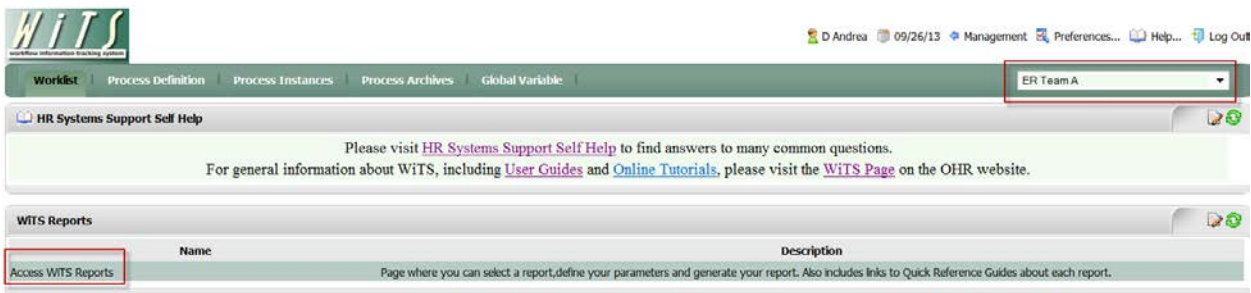
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Bizcoves on your Team Page

To **initiate a consultation** action, select the **Employee/Labor Relations Consultation** process from the 'WiTS Action Initiation' bizcove (section).



You can locate and access ER/LR Consultations and ER/LR Cases from the following bizcoves on your Team page (ER Team A, B, C and LR Team A). **Note: You must access your ER or LR team page in order to view the appropriate action type.** ER and LR data is not displayed on the same page. Additionally, at the top of each your Team's page is a link ("Access WiTS Reports") to both ER and LR reports. You can access both ER and LR reports from this link.



My Active ER or LR Worklist

This bizcove displays your active actions.

My Active ER Worklist													Filter By:	All Work
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"/>	26149	08/14/12 12:28:51 PM	ER Case	Conduct	AWOL, Confidential information - Failure to protect and/or disclosure, Discourteous/Inappropriate behavior, Ethics	MICHAEL	D ANDREA	Human Res Spec (Info Sys/Class)	GS	0201	13	OD - OHR	McDougal, Eugene	

My Active LR Worklist												
Case/Consult #	Date Rec'd in LR	Action Type	Related Matter	Related Case #	Type of Case	Labor Org	Employee First Name	Employee Last Name	IC	LR Specialist		
<input type="checkbox"/>	29152	09/11/13 11:15:04 AM	LR Case	32	Information Request	2171 - FOP (Police)			OD - ORS	DAndrea, Michael		

Active ER or LR Actions (Team #)

This bizcove displays your team's active actions.

Active ER Actions (Team A)													
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"/>	26354	09/14/12 12:53:32 PM	ER Case	Conduct	AWOL, Confidential information - Failure to protect and/or disclosure, Discourteous/Inappropriate behavior, Ethics	MICHAEL	D ANDREA	Human Res Spec (Info Sys/Class)	GS	0201	13	OD - OHR	Holloway, Lanetta

Active LR Actions (Team A)												
Case/Consult #	Date Rec'd in LR	Action Type	Related Matter	Related Case #	Type of Case	Labor Org	Employee First Name	Employee Last Name	IC	LR Specialist		
<input type="checkbox"/>	28886	08/08/13 09:27:29 AM	LR Consultation		28783	Labor Org				2220 - AFG 2923	OD - OHR	Hawthorne, Maurice

My Closed ER or LR Worklist

This bizcove displays your closed actions.

My Closed 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"/>	25599	05/29/12 02:35:14 PM	ER Consultation	CS - Medical	MICHAEL	D ANDREA					OD - OHR	Gorras, Maria

My Closed LR Worklist												
Case/Consult #	Date Rec'd in LR	Action Type	Related Matter	Related Case #	Type of Case	Labor Org	Employee First Name	Employee Last Name	IC	LR Specialist		
<input type="checkbox"/>	29194	09/20/13 02:52:30 PM	LR Consultation			Multiple Labor Orgs				OD - OHR	DAndrea, Michael	
<input type="checkbox"/>	29209	09/24/13 08:36:25 AM	LR Consultation		29185	Labor Org				2171 - FOP (Police)	OD - ORS	DAndrea, Michael

Closed ER or LR Actions (Team #)

This bizcove displays your team's closed actions.

Closed ER Actions (Team A)													
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"/>	25782	06/27/12 02:59:14 PM	ER Case	Conduct	AWOL	CHRISTOPHER	KERR	Student Trainee (Admin Asst)	GS	0399	05	OD - OHR	Verge, Terrye

Closed LR Actions (Team A)												
Case/Consult #	Date Rec'd in LR	Action Type	Related Matter	Related Case #	Type of Case	Labor Org	Employee First Name	Employee Last Name	IC	LR Specialist		
<input type="checkbox"/>	29209	09/24/13 08:36:25 AM	LR Consultation		29185	Labor Org				2171 - FOP (Police)	OD - ORS	DAndrea, Michael

Additionally, there is a bizcove, located at the bottom of your workarea page, displaying your HR System Support tickets that you have entered.


My Active HR Systems Support Transactions								
Ticket #	Process Name	Date Initiated	Date to HRSS	User	HRC Org	Priority	System	
<input type="checkbox"/>	89785	Request for HR Systems Support	07/23/13 08:20:00 AM	07/23/13 08:28:25 AM	Michael D andrea	SAID - TMWSB	Moderate	Capital HR (EHRP)

Quick Search Feature

The quick search feature can be used to locate any action in your bizcove or worklist. It searches all of the data elements (Case/Consult#, Position Title, Series, Employee Last Name, Labor Org, etc.) within the bizcove. *For example, if you are looking for all active actions with the Labor Org code '2171', you can simply type the number in the Quick Search text box and click the filter icon. Your worklist will then be filtered by anything that contains '2171.'* This works for every column in the worklist.

My Active LR Worklist										
Case/Consult #	Date Rec'd in LR	Action Type	Related Matter	Related Case #	Type of Case	Labor Org	Employee First Name	Employee Last Name	IC	LR Specialist
<input type="checkbox"/>	29152	09/11/13 11:15:04 AM	LR Case	32	Information Request	2171 - FOP (Police)			OD - ORS	DAndrea, Michael
<input type="checkbox"/>	29137	09/06/13 12:47:14 PM	LR Case	1	Information Request	2171 - FOP (Police)			OD - OHR	DAndrea, Michael
<input type="checkbox"/>	28787	08/05/13 12:01:12 PM	LR Case	14	Negotiated Grievance	2171 - FOP (Police)	DEREK	JETER	OD - OHR	DAndrea, Michael
<input type="checkbox"/>	28767	08/02/13 02:59:07 PM	LR Case	14	Representation	2171 - FOP (Police)			OD - ORS	DAndrea, Michael
<input type="checkbox"/>	28732	08/02/13 08:50:18 AM	LR Case	14	Information Request	2171 - FOP (Police)			OD - ORS	DAndrea, Michael

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

Quick Search: 

Completing the ER/LR Consultation Form

Selecting Employee Relations or Labor Relations

- **Consultation Type:** Upon opening the form, you must determine if the consultation is related to Employee or Labor Relations. Depending upon your selection, you will be presented with the appropriate form. *You may change your selection afterwards, but many data fields will be cleared if you change your selection.*



Employee/Labor Relations Consultation



Consult Information

* Required Fields

WITS #:	<input type="text" value="29216"/>	Date Entered:	<input type="text" value="09/24/2013 01:45 PM"/>
Action Type:	<input type="text" value="Consultation"/>	Date Recv'd in HR*: (mm/dd/yyyy)	<input type="text" value="09/24/2013"/>
Consultation Type*:	<div style="border: 1px solid black; padding: 2px;"><input type="text"/> Employee Relations Labor Relations</div>		

Employee Relations Consultation

The following form is displayed when 'Employee Relations' is selected from the Consultation Type field.

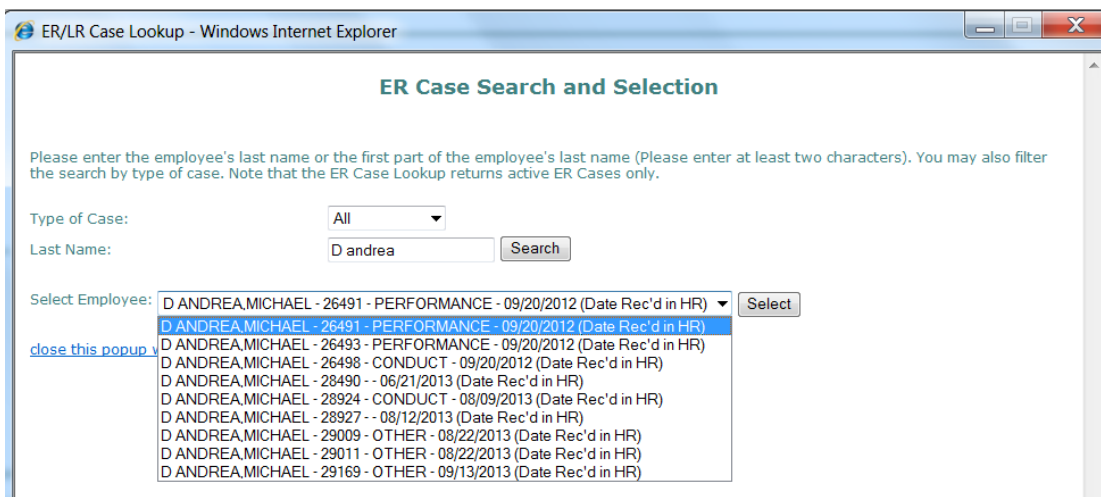
WITS #: 29216		Date Entered:	09/24/2013 01:45 PM	<small>* Required Fields</small>
Action Type:	ER Consultation	Date Recv'd in HR*: (mm/dd/yyyy)	09/24/2013	
Consultation Type*:	Employee Relations	Related Case Number: ? <small>(Case Lookup)</small>	29169	<input type="button" value="Clear"/>
Requestor First Name*:	Philip	Requestor Last Name*: <small>(VED Lookup)</small>	Lenowitz	
Requestor Email Address*:	lenowitp@mail.nih.gov	Institute/Center*:	OD - OHR	
Administrative Code*: <small>(Admin Code Lookup)</small>	HNAM41			
Organization Initials*:	OM OHR OD			
ER Branch Chief*:	Lesiw, Roman	ER Team*:	Team A	
ER Specialist*:	DAndrea, Michael	ER Team Leader*:	Coelho, Deborah	
Subject of Consultative Services*:	CS - Conduct	Consultative Services*:	Review Documents	
Consult Related to Employee?*	Yes	Other:	MSPB Appeal	
Employee First Name*:	MICHAEL	Employee Last Name*: <small>(Cap HR Lookup)</small>	D ANDREA	
Employee ID (Cap HR)*: (No Dashes)	00104456	Employee Admin Code*:	HNAM425	
Labor Organization*:	8888 - Not Eligible	Comments (Limit 150 characters)		
Date Closed*: (mm/dd/yyyy)	09/24/2013	Reviewed documents related to the upcoming MSPB Appeal case on 10/05/2013.		
Action Status Code*:	Green			
Action Status/Description*:	Active - With Specialist			

- **WITS#:** Automatically assigned when the action is created and is not editable.
- **Date Entered:** Automatically assigned when the action is created and is not editable.
- **Date Rec'd in HR:** Enter the date that the initial inquiry or request was received. The default date is the 'Date Entered.' This is the date that the consultation action begins.

- **Related Case Number (Optional):** This field is used to link consultation actions to active cases. This is used to show the amount of work and progression of a case. If the consultation action is related to an active case, use the *Case Lookup* feature to locate and link it. If a case is not established or if the consultation is not related to a case, leave this field blank. If you need to link your consultation to a closed case, follow the instructions in the [Activating a closed action](#) section of this guide to activate that case.

o *To link an active case to your consultation action, follow these steps:*

1. Select the 'Type of Case' you wish to search by (All, Conduct, Medical, Other, or Performance).
2. Enter part or the employee's entire last name in the 'Last Name' text box. Then click 'Search.'
3. Chose the case you wish to link in the drop down menu and then click 'Select.'
 - Depending upon the employee, many cases may appear in the drop down menu.



4. After clicking 'Select', the case will be successfully linked to your consultation action. *If you need to un-link the case, click the 'Clear' button.*

Related Case Number: [?](#)
[\(Case Lookup\)](#)

- **Requestor First Name, Last Name, & Email address:** The Specialist **must** use the *NED Lookup* feature to locate the contact information for the IC or Program area requestor (e.g., supervisor, administrative officer, or proposing official). For requests originating within WRD such as a team leader review or a re-draft of documents, ensure that you select the IC or Program area requestor that the consultation action is being performed for. By using the *NED Lookup* feature to select the desired IC or Program area requester, the service provided by the Specialist will be accurately reflected on reports and queries.
- **Administrative Code, Institute/Center, & Organization Initials:** These fields will autopopulate with the Requestor's information when the *NED Lookup* feature is used. You can edit the 'Administrative Code' or enter it manually if needed. You can also use the *Admin Code Lookup*

feature if you are unsure of the administrative code. Once the 'Administrative Code' is entered, the 'Institute/Center' and 'Organization Initials' will autopopulate.

- **ER Branch Chief, ER Team Leader, ER Specialist, & ER Team:** The ER Specialist is defaulted to the individual who initiates the action. The ER Specialist's Team, Team Leader, and Branch Chief are then populated. This information can be changed if needed. *If the ER Specialist belongs to multiple teams, the first team in alphabetical order that they have access to will be defaulted.*
- **Subject of Consultative Services:** Select the subject or category of the consultation action.
- **Consultative Services:** Select the appropriate type of service related to the consultation.
- **Other (Optional field):** For consultation actions related to 'Other' activities only, select the appropriate activity type or category.
- **Consult Related to Employee?:** Indicate whether the consultation is related to a specific employee.
- **Employee First Name, Last Name, & Employee ID:** If the consultation is related to a specific employee, their first and last name, admin code along with their Labor Organization (Bargaining Unit Code) are mandatory. These fields, along with the 'Employee ID', are autopopulated from the *Cap HR Lookup* feature. See the [Using the Cap HR Lookup Feature](#) section of this guide for more information.
- **Date Closed:** Enter the date that the consultation was completed or considered closed. This is the date that the consultation action ends.
- **Comments:** Enter any needed or required comments *Please ensure that you keep comments brief. Also note that comments are displayed on reports.*
- **Action Status/Description:** Select the appropriate status. The 'Action Status Code' will autopopulate based on the 'Action Status/Description' you select. The 'Action Status/Description' field is used to help others identify the status of a particular action quickly. See the [Action Status/Description Matrix](#) for more information.

Labor Relations Consultation

The following form is displayed when 'Labor Relations' is selected from the Consultation Type field.

WITS#:	29216	Date Entered:	09/24/2013 01:45 PM	* Required Fields
Action Type:	LR Consultation	Date Recv'd in HR*: (mm/dd/yyyy)	09/24/2013	
Consultation Type*:	Labor Relations	Related Case Number: ? (Case Lookup)	<input type="text"/> <input type="button" value="Clear"/>	
Requestor First Name*:	Philip	Related Matter: ?	32 HR IT Modernization (NFC) 2013	
Requestor Email Address*:	lenowitp@mail.nih.gov	Requestor Last Name*: (NED Lookup)	Lenowitz	
Administrative Code*: (Admin Code Lookup)	HNAM41	Institute/Center*:	OD - OHR	
Organization Initials*:	OM OHR.OD	LR Team*:	Team A	
LR Branch Chief*:	Lesiw, Roman	LR Team Leader*:	Coelho, Deborah	
LR Specialist*:	DAndrea, Michael	Consultative Services*:	Discuss w/Third Party	
Subject of Consultative Services*:	Labor Org	Other:	Other Agency/Op-Div	
Labor Organization*:	2171 - FOP (Police)	Comments (Limit 150 characters)	<input type="text"/>	
Date Closed*: (mm/dd/yyyy)	09/24/2013	Met with USDA and FOP Union officials to go over the changes related to the NFC Migration.		
Action Status Code*:	Green			
Action Status/Description*:	Active - With Specialist			

- **WITS#:** Automatically assigned when the action is created and is not editable.
- **Date Entered:** Automatically assigned when the action is created and is not editable.
- **Date Rec'd in HR:** Enter the date that the initial inquiry or request was received. The default date is the 'Date Entered.' This is the date that the consultation action begins.
- **Related Case Number (Optional):** This field is used to link consultation actions to cases. This is used to show the amount of work and progression of a case. If the consultation action is related to a case, use the *Case Lookup* feature to locate and link it. If a case is not established or if the consultation is not related to a case, leave this field blank.

- *When the related case is associated to the Union as a whole and not a specific employee:*
 1. Select the 'Type of Case' you wish to search by (All, Information Request, Negotiability, Negotiation, Negotiated Grievance, Representation, or Unfair Labor Practice).
 2. In the Labor Organization field, select the Union. Then click 'Search By Labor Organization.'
 3. Chose the case you wish to link in the drop down menu and then click 'Select.'

 - *When the related case is associated to a specific employee and not a Union as a whole:*
 1. In the Last Name field, enter all or part of the employee's last name. Then click 'Search By Last Name.'
 2. Chose the case you wish to link in the drop down menu and then click 'Select.'
- To help make your selection, the WiTS number, Type of Case, Labor Organization, Date Rec'd in HR, and first 25 characters of the comments field are displayed.

- After clicking 'Select', the case will be successfully linked to your consultation action. *If you need to un-link the case, click the 'Clear' button.*

Related Case Number: [?](#)
[\(Case Lookup\)](#)

- **Related Matter (Optional):** The Matter field is used to link or relate many Labor Relations Cases and/or Consultations together that share a common issue. If your consultation is not directly related to an LR Case, but is related to an overarching issue, select the Matter. If not, leave this field blank. Only active Matters will appear in the Matter drop down menu.

Note: You cannot relate a consultation action to both a Matter and a case. If your consultation action is related to a case that is related to a Matter, the LR Status Report will reflect this.

- **Requestor First Name, Last Name, & Email address:** Specialist **must** use the *NED Lookup* feature to locate the contact information for the IC or Program area requestor (e.g., supervisor, administrative officer, or proposing official). For requests originating within WRD such as a team leader review or a re-draft of documents, ensure that you select the IC or Program area requestor that the consultation action is being performed for. By using the *NED Lookup* feature to select the desired IC or Program area requester, the service provided by the Specialist will be accurately reflected on reports and queries.
- **Administrative Code, Institute/Center, & Organization Initials:** These fields will autopopulate with the Requestor's information when the *NED Lookup* feature is used. You can edit the 'Administrative Code' or enter it manually if needed. You can also use the *Admin Code Lookup* feature if you are unsure of the administrative code. Once the 'Administrative Code' is entered, the 'Institute/Center' and 'Organization Initials' will autopopulate.
- **LR Branch Chief, LR Team Leader, LR Specialist, & LR Team:** The LR Specialist is defaulted to the individual who initiates the action. The LR Specialist's Team, Team Leader, and Branch Chief are then populated. This information can be changed if needed.
- **Subject of Consultative Services:** Select the subject or category of the consultation action.
 - Employee – *select this option when the subject of the consultation is related to one specific employee (e.g., a meeting about a Negotiated Grievance for a particular employee).*
 - Labor Org – *select this option when the subject of the consultation is related to one specific Union as a whole (e.g., drafting documents related to the Union's filing of an Unfair Labor Practice).*
 - Multiple Labor Orgs—*select this option when the subject of the consultation is related to many Unions (e.g., a meeting with management about the status of several LR Cases).*
- **Employee First Name, Last Name, Employee ID:** If the consultation is related to a specific employee, their first and last name, admin code along with their Labor Organization (Bargaining Unit Code) are mandatory. These fields, along with the 'Employee ID', are autopopulated from the *Cap HR Lookup* feature. See the [Using the Cap HR Lookup Feature](#) section of this guide for more information.
- **Labor Organization:** If the consultation is related to one specific Union as a whole, the Labor Organization is mandatory. Select the appropriate Union from the drop down list.
- **Consultative Services:** Select the appropriate type of service related to the consultation.
- **Other (Optional field):** For consultation actions related to 'Other' activities only, select the appropriate activity type or category.

- **Date Closed:** Enter the date that the consultation was completed or considered closed. This is the date that the consultation action ends.
- **Comments:** Enter any comments needed or required. Please *ensure that you keep comments brief. Also note that comments display on reports.*
- **Action Status/Description:** Select the appropriate status. The 'Action Status Code' will autopopulate based on the 'Action Status/Description' you select. The 'Action Status/Description' field is used to help others identify the status of a particular action quickly. See the [Action Status/Description Matrix](#) for more information.

Using the Cap HR Lookup Feature

Note: It is recommended for Specialists to use the Cap HR Lookup feature. It is the only way to generate the 'Employee ID.' WITS uses the 'Employee ID' to relate other ER/LR Cases and Consultations to a specific employee. Using the Cap HR Lookup feature also auto-populates the employee's Labor Organization (Bargaining Unit Code). Not using the Cap HR Lookup feature will cause a misrepresentation or incomplete history of ER and LR Case and/or Consultation actions for a specific employee on reports.

1. Click on the Cap HR Lookup link under the 'Employee Last Name' field.

Employee Last Name*:
([Cap HR Lookup](#)) 

2. Type in part or all of the employee's last name and then click the 'Search' button. To further narrow the list of names returned, you can also search by the employee's first name.
3. Locate the correct employee in the 'Select User' field and then click the 'Select' button.
 - a. The employee's title and administrative code will be displayed to assist you with your selection.



Cap HR Profile Selector - Windows Internet Explorer

Cap HR Profile Search and Selection

Please enter the employee's last name or the first part of the employee's last name (Please enter at least two characters). You may also enter the all or the first part of the employee's first name:

Last Name:

First Name:

Select Employee:

The employee data is pulled directly from Cap HR. Please ensure the correct employee has been selected.

[close this popup window](#)

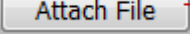
Action Status/Description Matrix

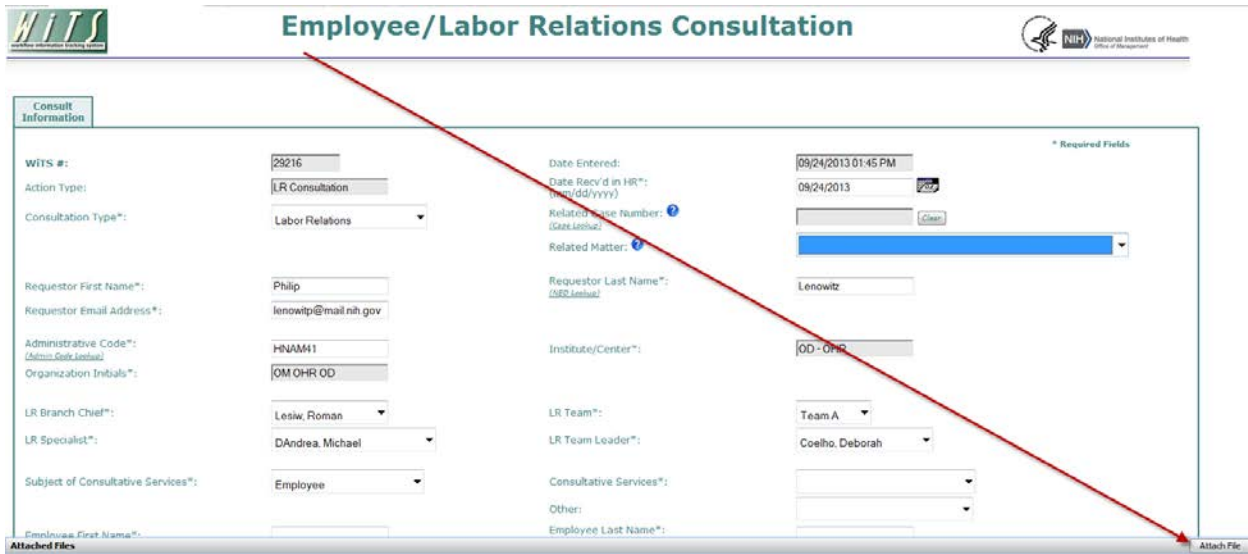
Action Status/Description	Action Status Code (Color)	Action Status Meaning
Active—With Specialist	Green	Action is active and is with the Specialist (<i>Default status</i>)
Active—With Assistant	Green	Action is active and is with the Assistant (<i>Automatically changes when action is sent to the Assistant</i>)
Active—Under Review (Team Leader)	Green	Action is active and is with the Team Leader (<i>Automatically changes when action is sent to the Team Leader</i>)
Active—Under Review (Branch Chief)	Green	Action is active and is with the Branch Chief (<i>Automatically changes when action is sent to the Branch Chief</i>)
Active—With IC	Yellow	Action is active and is with the IC for action (<i>Must be changed manually</i>)
Closed	Red	Action is Closed (<i>Automatically changes when action is sent to the Closed page by selecting the close option in the routing menu.</i>)
Archived	Blue	Action is Archived (<i>Automatically changes when action is sent to the Archives page</i>)
Active—Third Party (Non-Appeal)	Tan	Action is active and is pending action/decision from an entity outside of the NIH and is not related to an appeal. (<i>Must be changed manually</i>)
Pending—Under Appeal	Tan	Action is pending and is under appeal (<i>Must be changed manually</i>)

Due to the nature of ER/LR Consultations, you should only have to update the ‘Action Status/Description’ in rare cases.

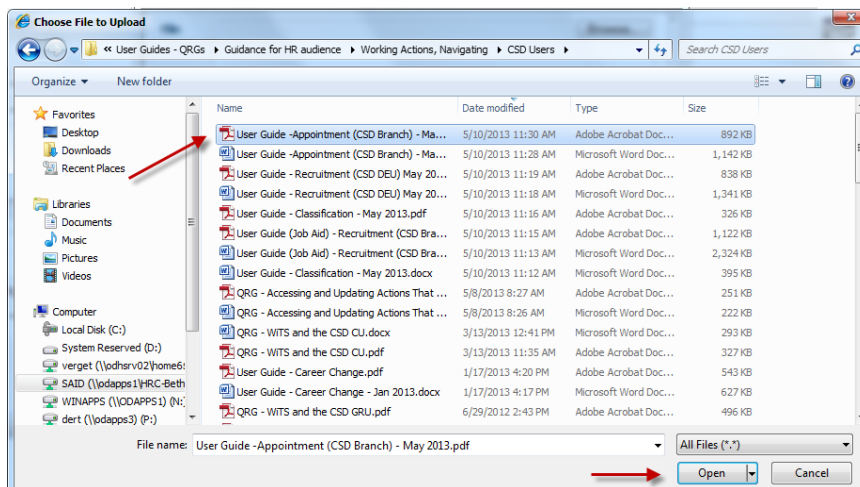
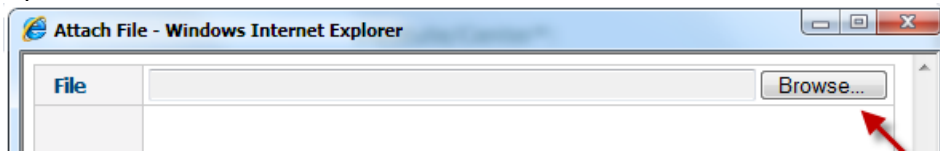
Attaching Documents

You can attach documents of any type (Word, Excel, PowerPoint, PDF, etc.) easily to WiTS actions. There is no limit to the size of attached files in WiTS; however, it is recommended that the total size of all files you attach to an action be under 80MB (most attached documents tend to be less than 1MB).

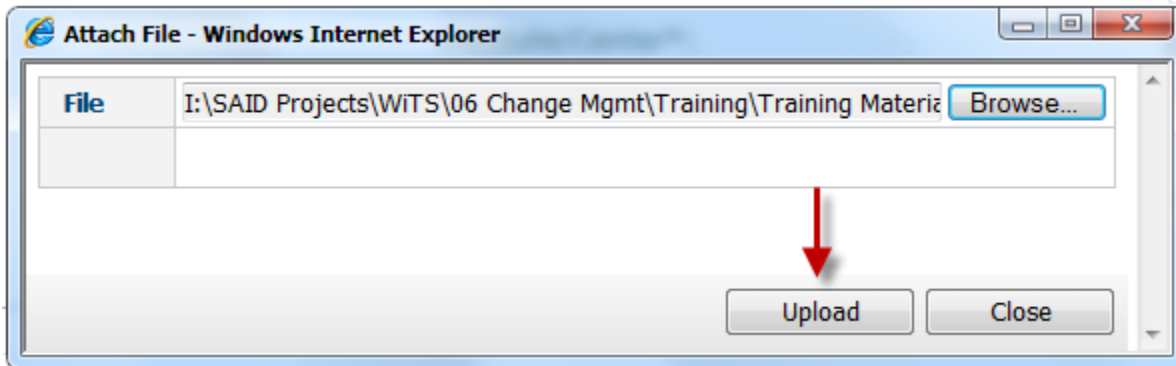
To attach a document, click on the 'Attach File'  button on the lower right hand corner of the form:



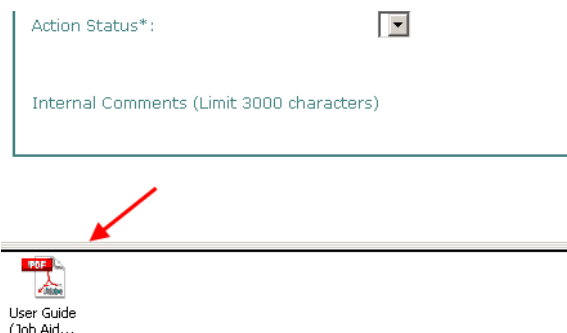
From the Attach dialog box, click 'Browse' to locate the document that you would like to attach to the action and *click* 'Open.'



Then click 'Upload' in the Attach File dialog box:



The attached file will appear at the bottom of the form.

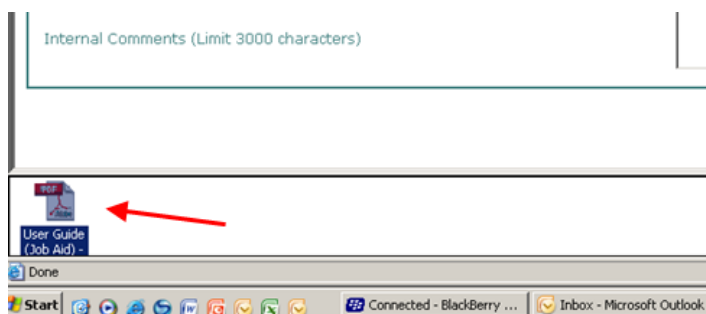


You can repeat this process to attach as many files as you need.

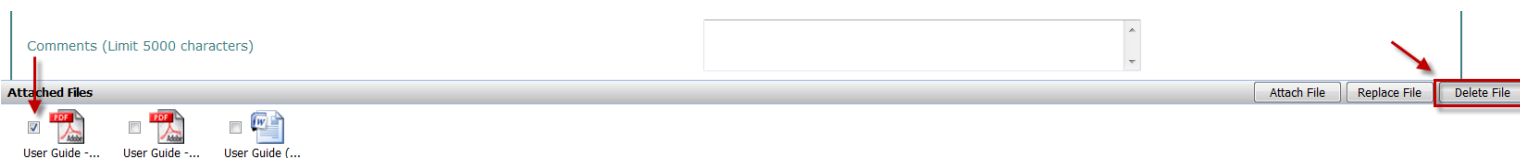


Your attached documents will remain with the action as it moves through the subsequent activities in the process and are retrievable even after the action is completed and archived.

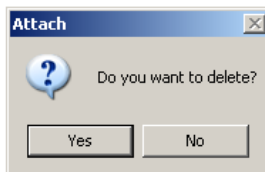
To delete an attachment, select the document by clicking on the checkbox next to it.



Click the 'Delete' button on delete the file from the action.



A pop-up message will appear asking you to confirm that you want to delete the attachment. Click 'Yes.'



Your document will be deleted from the action.

Note: Only documents are to be attached to the WiTS action. Documents such as letters of reprimand and last chance agreements are appropriate. Audio and video files and images may not be attached to the WiTS action.

Note: WiTS actions may not contain Personally Identifiable Information (PII). You must redact any document containing PII such as an employee's Social Security number or Date of Birth before attaching it to a WiTS action.

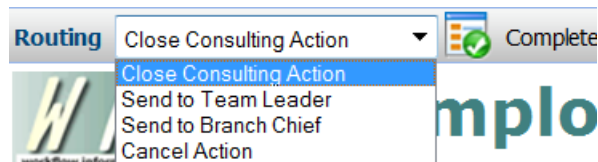
Closing the Action

When you are ready to close the ER/LR Consultation action, follow these three (3) steps:

1. Enter the date the consultation was completed or considered closed in the 'Date Closed' field



2. Make sure 'Close Consulting Action' is selected in the routing menu
3. Click on the complete button (the green checkmark)



Following these steps will automatically set the ER/LR Consultation 'Action Status' to red and the 'Action Status/Description' to Closed. Additionally, this will remove the action from your worklist and route it to the 'My Closed ER Worklist' or 'My Close LR Worklist' and your Team's Closed Worklist. At this point, the action is considered closed.

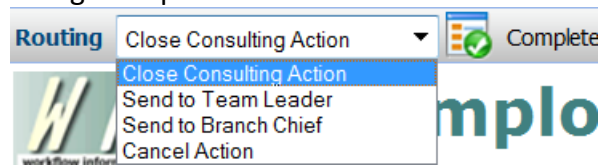
Note: Actions will archive automatically after 365 days of inactivity (*action has not been saved*). Saving an action will re-start the 365 days. See the [Archiving Closed Actions](#) section for information on archiving an action manually.

Routing the Action


WITS offers users the ability to route actions to participants contained within the workflow. While the routing of actions is an optional process for the ER/LR Consultation workflow, you will use the same 'routing menu' to close or cancel an action.

As a Specialist

After all of the relevant information is complete, the ER/LR Specialist makes a selection from the routing menu to move the action through the process:




- **“Send to Team Leader”** – use this response to route the action to the Team Leader for review, if necessary. This will also update the ‘Action Status/Description.’
- **“Send to Branch Chief”** – use this response to route the action to the Branch Chief for review, if necessary. This will also update the ‘Action Status/Description.’
- **“Close Consulting Action”** – use this response to route the action to the ‘My Closed ER Worklist’ or ‘My Closed LR Worklist’ and your Team’s Closed Worklist. This will also update the ‘Action Status/Description’ to Closed.
- **“Cancel Action”** – only use this response to cancel an action entered in error. *Cancelled actions do not appear on any reports or dashboards.*

When the appropriate selection has been made, *click* the checkbox icon  next to the menu.

As a Team Leader

When/if the Team Leader receives an action, he/she reviews the form and then makes a selection from the routing menu.


- **“Send to Specialist”** – use this response to route the action to the Specialist. This will also update the ‘Action Status/Description.’
- **“Send to Branch Chief”** – use this response to route the action to the Branch Chief for review, if necessary. This will also update the ‘Action Status/Description.’
- **“Close Consulting Action”** – use this response to route the action to the ‘My Closed ER Worklist’ or ‘My Close LR Worklist’ and your Team’s Closed Worklist. This will also update the Action Status/Description to Closed.
- **“Cancel Action”** – only use this response to cancel an action entered in error. *Cancelled actions do not appear on any reports or dashboards.*

When the appropriate selection has been made, *click* the checkbox icon  next to the menu.

As a Branch Chief

When/if the Branch Chief receives an action, he/she reviews the form and then makes a selection from the routing menu.

- **“Send to Specialist”** – use this response to route the action to the Specialist. This will also update the ‘Action Status/Description.’
- **“Send to Team Leader”** – use this response to route the action to the Team Leader for review, if necessary. This will also update the ‘Action Status/Description.’
- **“Close Consulting Action”** – use this response to route the action to the ‘My Closed ER Worklist’ or ‘My Closed LR Worklist’ and your Team’s Closed Worklist. This will also update the Action Status/Description to Closed.
- **“Cancel Action”** – only use this response to cancel an action entered in error. *Cancelled actions do not appear on any reports or dashboards.*

When the appropriate selection has been made, *click* the checkmark button  next to the menu.

Activating and Archiving Closed Actions

Closed ER/LR Consultation actions are located in the 'My Closed ER Worklist' or 'My Closed LR Worklist' and your Team's Closed Worklist. Fields on a closed action can be updated, but the action cannot be routed unless it is activated. Additionally, Closed ER/LR Consultation actions can be archived manually.

Opening a closed action:

1. Locate the action you wish to open and *click* on the 'Case #.'

My Closed ER Worklist													Filter By: All Work
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"/> 25599	05/29/12 02:35:14 PM	ER Consultation	CS - Medical		MICHAEL	D ANDREA					OD - OHR	Gorrasi, Maria	
<input type="checkbox"/> 25600	05/29/12 02:41:18 PM	ER Consultation	CS - Medical	Customized training	Jim	Thome					Test	Unda, Luis	

2. Place a checkmark in the last or bottom row.
3. *Click* on the 'Complete' button. This will open the action. Once the action is open, you can edit any of the fields on the form.
 - a. *Note: You can click on the 'View' button if you wish to only view the information on the form, but not save or modify it.*

Step 3. Click Complete.

ID	Status	Activity	Completed By	Participant	Created Date	Repair Work Item
<input type="checkbox"/> 101	Completed	ERS/LRS Creates Action	DAndrea	DAndrea	09/20/13 02:52:30 PM	
<input checked="" type="checkbox"/> 103	Created	ER/LR Rep Reviews Closed Action		DAndrea	09/20/13 02:53:09 PM	

Step 2. Place checkmark in last row.

Activating a closed action:

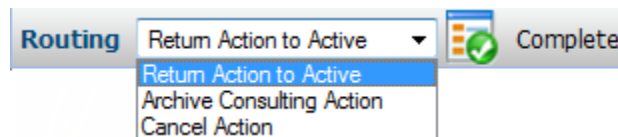
1. Ensure that the appropriate ER or LR Specialist is listed under the 'Assigned ER Specialist' or 'Assigned LR Specialist.' The action will be routed to this individual once activated.

Note: You must return the action to an ER/LR Specialist who is located in WRD ER/LR and is a WiTS user.

LR Specialist Assigned*:

Verify/select valid ER/LR Specialist if returning to active status:

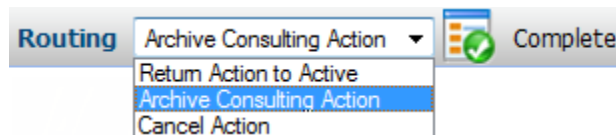
2. Select 'Return Action to Active' from the routing menu, and *click* on the checkmark button.



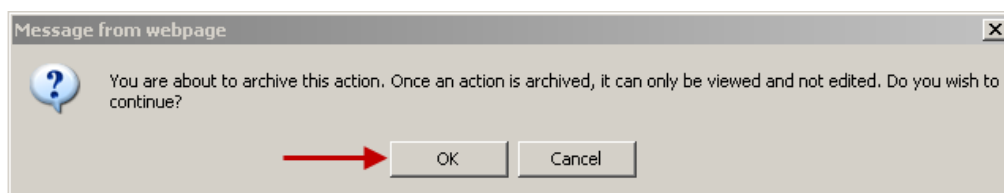
- The action will be moved to the worklist of the Assigned ER/LR Specialist or the ER/LR Specialist selected in the dropdown menu.

Archive a closed action manually:

1. Select 'Archive Consulting Action' from the routing menu, and *click* on the checkmark button.



2. You will receive a pop-up message asking you to confirm that you wish to archive the action. If you wish to archive the action, *click* 'OK.'



- The action will be moved to the ER or LR Archives page and will no longer be editable.