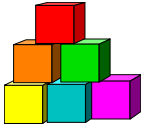


Worklists

Chapter Topics

Using the Hold Extend Worklist (Resulting from a Prob Extend in Another Agency)	22-3
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Using the Hold Extend Worklist (Resulting from a Prob Extend in Another Agency)

When an agency extends an employee’s probation and that employee has a probationary leave in a different agency, the system automatically extends the probationary leave. The probationary leave agency will receive notification of this extension on the **Generated Hold Extend** worklist.



Access the Worklist

1. Click the Worklist  icon.

The Worklist page will display. Each row in this area acts as a folder, displaying transactions that have similar characteristics.

Detail	Business Process	Activity	Worklist	Count
1 Detail	NY Hold Extend Leave	NY Generated Hold Extend	Generated Hold Extend	1
2 Detail	NY Process Separation	NY Generated Separation	Generated Separation	1

Worklist Field Descriptions

Field	Description
Detail	When pressed, calls up all notifications with common workflow characteristics.
Business Process	The form type of the notification.
Activity	Describes where the notification is in NYSTEP workflow.

Field	Description
Worklist	Last action taken against the notification.
Count	The number of notifications within each row of the Worklist.



Access the Details

The **Worklist** is made up of transaction request data grouped by the **Business Process** (i.e. NY Hold Extend Leave), its **Activity** (i.e. NY Generated Hold Extend), and the **Worklist** (i.e. Generated Hold Extend).

1. Press the **Detail** button for **NY Hold Extend Leave**.

*The individual notification will appear in a **Details** box at the bottom of the page.*

NYSTEP Home Worklist Reports Help Sign Out

Home > PeopleTools > Worklist > Use > Worklist [New Window](#)

Worklist for PERUSER: PER User					
Detail	Business Process	Activity	Worklist	Count	
1 Detail	NY Hold Extend Leave	NY Generated Hold Extend	Generated Hold Extend	1	
2 Detail	NY Process Separation	NY Generated Separation	Generated Separation	1	


Field 1: Field 2: Field 3: **Sort** **Save Comments**

Details									
Mark Worked	SSN	Rcd#	Agency	Line	Name	Eff Date	Action	Reason	Descr
1 <input checked="" type="checkbox"/>	Available Work It	111111111	0	08000	15162	Probextend,Worklist	03/30/2004	HLD	EXL

Available	Sent From	WL Comments
05/04/2004	Hughes,Doreen M	<input type="text"/>

Note: The top portion (*Worklist for PER USER*) of this page is explained in the previous section.

Details Field Descriptions

Field	Description
Field 1 (sort option)	Orders the displayed results by the data field chosen (i.e. Action Code, Title Code. etc.).
Field 2 (sort option)	Orders the displayed results by the data field chosen (i.e. Action Code, Title Code. etc.). Secondary sort order.
Field 3 (sort option)	Orders the displayed results by the data field chosen (i.e. Action Code, Title Code. etc.). Third level sort order.
Sort	When clicked, arranges the search results in the order specified by Field (1/2/3) .
Save Comments	When pressed saves any comments entered into WL Comments.
Details	
Mark Worked 	When clicked, deletes the notification from the Worklist. When you hover over the check mark with your cursor, it will change to a red X. Ignore this and click anyway.
(Available/Selected)	Indicates whether or not the notification has been accessed.
Work It	Opens the Employee Availability page for viewing.
SSN	Social Security Number of the employee whose probationary leave was extended.
Rcd#	Employment Record Number (If not 0, see the <i>Concurrent Appointment Request</i> chapter).
Agency	Numeric code of the agency.
Line	Line item number of the position where employee's probationary leave has been extended.
Name	Name of employee whose probationary leave has been extended.
Eff Date	The date the probationary leave extension becomes effective.
Action	The action code used to process the notification.
Reason	The reason code used to process the notification.
Descr	Title of the position where the probationary leave is being extended.
Available	Date the item became available on the Worklist.
Sent From	If the Prob Extend submitted by the other agency is virtually approved, it would be the person at the other agency who submitted the transaction. If the Prob Extend submitted by the other agency did not virtually approve, it would be the person at Civil Service who processed the transaction.
WL Comments	Explanatory notes.

The Generated Hold Extend Notification displays as the Employee Availability page for the employee whose probationary leave has been extended.

Probextend,Worklist SSN: 111111111 Empl Rcd #: 0

EMPLOYEE INFORMATION

Classified Service: 05/13/1999	Veteran Status: Non Vet	Exempt Vol Firefighter:	Retiree Indicator:
---------------------------------------	--------------------------------	--------------------------------	---------------------------

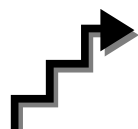
INCUMBERING View All First 1 of 1 Last

Agency: 01150 Employ Relatns	Line #: 00811	Pos #: 00021140	Appt Lvl Chg: N
Title: 1441400 Assoc Persnl Admr	55: JC: 0	SG: 23	NU: 06
Location: 0110 Albany	Fund: GEN	Phi Tag:	PositionAvailability
Action Rsn: IAG PROB EXT	Appv Ends:	Appt Status: C	Spclty:
Prob Ends: 05/19/2004	Trainership Ends:	FT/PT/MRHR: F	Pd Lv Ends:


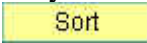
ENCUMBERING View All First 1 of 1 Last

Agency: 08000 Civil Service	Line #: 15162	Pos #: 00036895	Appt Lvl Chg: N
Title: 1405300 Senr Staffing Sv Rep	55: JC: 0	SG: 18	NU: 06
Location: 0110 Albany	Appt Status: C	Spclty:	
Action Rsn: HLD EXTEND LV	FT/PT/MRHR: F	Leave Begins: 04/01/2003	Leave Ends: 05/19/2004

[Employee History](#)



Work with the Page

The results of a **Detail** search can be sorted in a variety of ways. Press the  at the end of the **Field (1/2/3)** data box and select the field by which the results should be sorted. The data can be ordered by three different fields. **Field 1** will order first, followed by **Field 2** and then **Field 3**. Press  and the data will order as specified.



NOTE: The **Find** feature helps the user locate specific items on the **Details** portion of the Worklist. For example, if a user is looking for a specific title, click the **Find** hyperlink and in the search dialog box enter the title and press **OK**. The system will bring you to the first occurrence in the portion of the Worklist that you are accessing. Note: the data must be entered the way the data appears in the **Details** portion of the Worklist. Partial searches are accepted.

1. To view an individual notification, click **Work It**. The Worklist page will be replaced by the **Employee Availability** page.

To view another notification return to the Worklist by clicking the  icon.

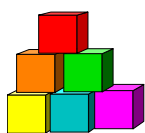
Brief explanatory comments, limited to 30 characters, can be made in the Worklist regarding a notification. In the **WL Comments** data field, enter any applicable notes. To keep these comments the **Save Comments** button must be pressed. Once comments are entered they cannot be deleted, but they may be edited.

Prior to a notification being selected from the Worklist, an item will be marked **Available**. After having clicked the **Work It** hyperlink the notification will be marked **Selected** when the Worklist is next accessed.

To clear a notification from the Worklist, click  (when you hover over the checkmark with your cursor, it will change to a red X. Ignore this and click anyway). This will immediately remove the request row from the Worklist of all who had access.



NOTE: If a notification is inadvertently marked worked and removed from a worklist, view the menu item for **Employee Availability**. Enter the **SSN** or **Name** of the employee into the search dialog box.



Using the Separations Worklist (Resulting from XAG Appointments)

When an appointment resulting from a **Cross Agency Appt Request** (using the action code **XAG**) is processed by DCS, the losing agency (the agency that the employee is leaving) is notified of the appointment by an **Incoming Worklist Separations** page. These generated separations appear in the Worklist of the losing agency.



Access the Worklist

1. Click the Worklist  icon.

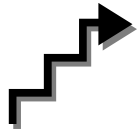
*The **Worklist** page will display. Each row in this area acts as a folder, displaying transactions that have similar characteristics.*

Detail	Business Process	Activity	Worklist	Count
1 Detail	NY Hold Extend Leave	NY Generated Hold Extend	Generated Hold Extend	1
2 Detail	NY Process Separation	NY Generated Separation	Generated Separation	1

Worklist Field Descriptions

Field	Description
Detail	When pressed, calls up all transactions with common workflow characteristics.
Business Process	The form type of the transaction.
Activity	Describes where the transaction is in NYSTEP workflow.

Field	Description
Worklist	Last action taken against the request.
Count	The number of transactions within each row of the Worklist.



Access the Details

The **Worklist** is made up of transaction request data grouped by the **Business Process** (i.e. NY Process Separation), its **Activity** (i.e. NY Generated Hold Extend), and the **Worklist** (i.e. Generated Separation).

1. Press the **Detail** button for **NY Process Separation**.

*The individual transaction requests will appear in a **Details** box at the bottom of the page.*

NYSTEP Home Worklist Reports Help Sign Out

Home > PeopleTools > Worklist > Use > Worklist [New Window](#)

Worklist for PERUSER: PER User					First	1-2 of 2	Last
	Detail	Business Process	Activity	Worklist	Count		
1	Detail	NY Hold Extend Leave	NY Generated Hold Extend	Generated Hold Extend	1		
2	Detail	NY Process Separation	NY Generated Separation	Generated Separation	1		

Field 1: Field 2: Field 3: [Sort](#) [Save Comments](#)

Details										Find	View All	First	1 of 1	Last	
Mark Worked	SSN	Rcd#	Agency	Line	Name	Eff Date	Action	Reason	Descr						
1 <input checked="" type="checkbox"/>	Available Worklist	888888888	0	08000	15139	Gensep,Worklist	04/01/2004	SEP	Assoc Persnl Admr						

Available	Sent From	WL Comments
05/04/2004	Hughes,Doreen M	<input type="text"/>


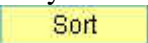
Note: The top portion (*Worklist for PER USER*) of this page is explained in the previous section.

Worklist Page Field Descriptions

Field	Description
Field 1 (sort option)	Orders the displayed results by the data field chosen (i.e. Action Code, Title Code. etc.).
Field 2 (sort option)	Orders the displayed results by the data field chosen (i.e. Action Code, Title Code. etc.). Secondary sort order.
Field 3 (sort option)	Orders the displayed results by the data field chosen (i.e. Action Code, Title Code. etc.). Third level sort order.
Sort	When clicked, arranges the search results in the order specified by Field (1/2/3) .
Save Comments	When pressed saves any comments entered into WL Comments.
Details	
Mark Worked	When clicked, deletes the transaction from the Worklist. When you hover over the check mark with your cursor, it will change to a red X. Ignore this and click anyway.
(Available/Selected)	Indicates whether or not the request has been accessed.
Work It	Opens the Transaction Summary page for processing.
SSN	Social Security Number of the employee being separated.
Rcd#	Employment Record Number (If not 0, see the <i>Concurrent Appointment Request</i> chapter).
Agency	Numeric code of the agency.
Line	Line item number of the position from which the employee is being separated.
Name	Name of employee being separated.
Eff Date	The date the separation becomes effective.
Action	The action code used to process the transaction.
Reason	The reason code used to process the transaction.
Descr	Title of the position from which the employee is being separated.
Available	Date the item became available on the Worklist.
Sent From	If the XAG virtually approved, it would be the person at the other agency who submitted the transaction. If the XAG did not virtually approve, it would be the person at Civil Service who processed the transaction.
WL Comments	Explanatory notes.



Work with the Page


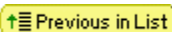

The results of a **Detail** search can be sorted in a variety of ways. Press the  at the end of the **Field (1/2/3)** data box and select the field by which the results should be sorted. The data can be ordered by three different fields. **Field 1** will order first, followed by **Field 2** and then **Field 3**. Press  and the data will order as specified.




NOTE: The **Find** feature helps the user locate specific items on the **Details** portion of the Worklist. For example, if a user is looking for a specific title, click the **Find** hyperlink and in the search dialog box enter the title and press **OK**. The system will bring you to the first occurrence in the portion of the Worklist that you are accessing. Note: the data must be entered the way the data appears in the **Details** portion of the Worklist. Partial searches are accepted.

1. To work an individual transaction request, click **Work It**. The Worklist page will be replaced by the **Incoming Worklist Separations** page.

To work an individual sequence, click the **Go Seq** hyperlink. This gives access to only that sequence. To work multiple sequences of a request, click the **Work All Seq** hyperlink. This opens the entire transaction to processing.

To work another transaction without returning to the Worklist, click the  OR  buttons. To return to the Worklist, click the  icon.

Brief explanatory comments, limited to 30 characters, can be made in the Worklist regarding a request. In the **WL Comments** data field, enter any applicable notes. To keep these comments the  button must be pressed. Once comments are entered they cannot be deleted, but they may be edited.


Prior to a request being selected from the Worklist, an item will be marked **Available**. After having clicked the **Work It** hyperlink the transaction will be marked **Selected** when the Worklist is next accessed.

To clear a transaction from the Worklist, click  (when you hover over the checkmark with your cursor, it will change to a red X. Ignore this and click anyway). This will immediately remove the request row from the Worklist.



NOTE: If a transaction is inadvertently marked worked and removed from a Worklist, it can still be accessed using the menu item for **Incoming Worklist Separation**. Enter the transaction information into the search dialog box.

Processing a System Generated Separation



[Home](#) > [NY Personnel Management](#) > [Incumbent Change Request](#) > [Use](#) > [Incoming Worklist Separations](#) [New Window](#)

Gensep_Worklist SSN: 888888888 Empl Rcd #: 0

Transaction			
Effective Date:	04/01/2004	Eff Seq:	0
Action:	Separation		Request Dt: 05/04/2004
Separated From			
Pos #:	00036782	Agency:	08000 Civil Service
Title:	1405400 Assoc Staffing Sv Rep	55:	JC: 0 SG: 23 NU: 06 Prob Waive <input type="checkbox"/>
Location:	0110 Albany	Appointment Level Change <input type="checkbox"/>	
Receiving Agency Info			
Pos #:	00021140	Agency:	01150 Employ Relatns
Title:	1441400 Assoc Persnl Admr	55:	JC: 0 SG: 23 NU: 06 Prob Waive <input type="checkbox"/>
Location:	0110 Albany	Reason:	Transfer - Admin (\$52.6) Appointment Level Change <input type="checkbox"/>
Separation Reason		Override System Generated Separation	
Reason Code:	<input type="text"/>	Do Not Separate Dual Employee <input type="checkbox"/>	
Lv Begins:	04/01/2004	<input type="button" value="Submit"/>	
Lv Ends:			

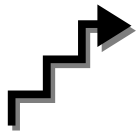


Incoming Worklist Separations Page Field Descriptions

Field	Description
Name	The employee's name.
SSN	The employee's Social Security Number.
Empl Rcd #	(Employment Record Number) If an employee is (or was) being paid simultaneously from two or more positions with different titles or status within one agency, OR two positions in different agencies, the record of transactions against each position is retained separately by Empl Rcd#. (See the <i>Concurrent Appointment Request</i> chapter.)
Effective Date	The effective date of the XAG appointment.
Eff Seq	Effective Sequence number.
Action	The Action being taken.
Separated From	
Pos #	The position number from which the employee is being separated.
Agency	The agency code and agency name from which the employee is being separated.

Field	Description
Status	The status of the employee in the position from which he/she is being separated.
Item #	The item number from which the employee is being separated.
Title	The title code and title from which the employee is being separated.
55, JC, SG, NU	The 55b/c status, if any, jurisdictional class, salary grade and negotiating unit of the job from which the employee is being separated.
Prob Waive	Some Action Reasons allow the probation period to be waived. If checked, this check box indicates that the probation period has been waived.
Location	Location code and location of the position from which the employee is being separated.
Appointment Level Change	If the employee was appointed to the position from which he/she is being separated at other than budgeted level, this box will be checked.
<i>Receiving Agency Info</i>	
Pos #	The position number to which the employee is being appointed.
Agency	The agency code and agency name to which the employee is being appointed.
Status	The status of the employee in the position to which he/she is being appointed.
Item #	The item number to which the employee is being appointed.
Title	The title code and title to which the employee is being appointed.
55, JC, SG, NU	The 55B/C status, if any, jurisdictional class, salary grade and negotiating unit of the job to which the employee is being appointed.
Prob Waive	Some Action Reasons allow the probation period to be waived. If checked, this check box indicates that the probation period has been waived.
Location	Location code and location of the position to which the employee is being appointed.
Reason	Reason code used to make the appointment.
Appointment Level Change	If the employee is being appointed to the position at other than budgeted level, this box will be checked.
<i>Separation Reason</i>	

Field	Description
Reason Code	The reason code used to process the separation. This may remove the employee from the item, or create a hold (leave).
Lv Begins	The date the leave begins or blank.
Lv Ends	The date the leave ends or blank.
Do Not Separate Dual Employee	If checked, indicates the employee is not separated. The gaining agency should have submitted the appointment as a concurrent request.



Work with the Page

Separation Reason

The losing agency is required to process the **Incoming Worklist Separations** page. There are two options:

1. Click the  and select the appropriate **Reason Code** for the separation.

OR

2. If the employee is being appointed to an additional job and is going to continue to be paid from the position displayed in the **Separated From** work group, in the **Override System Generated Separation** work group, mark the check box **Do Not Separate Dual Employee**.
3. Click the **Submit** button.



NOTE: If the separation reason is **MLV**, NYSTEP will enter the **Lv Begins** and there is no **Lv Ends**. If the separation reason is **PBL** or **LIT**, NYSTEP will enter the **Lv Begins** and the **Lv Ends**.

If an agency needs to separate an employee who has accepted an **XAG** appointment, before receiving the **Incoming Worklist Separations** page the agency can submit a separation transaction using the **Other Transaction Request** option.

Remove Transactions from the Worklist

After the system generated separation page has been submitted to DCS, no changes can be made at the agency level. The transaction is automatically removed from the worklist of all who had access.

If an agency has not submitted, or DCS has not processed the worklist item for a system generated separation in a position, this message will appear on **Position Availability** to indicate the Position may not be vacant.

NYSTEP Home Worklist Reports Help

Home > NY Personnel Management > Incumbent Change Request > Inquire > Position Availability [New Window](#)

Agency: 08000 Civil Service Line #: 15139 Pos #: 00036782

POSITION INFORMATION

Title: 1405400 Assoc Staffing Sv Rep 55: JC: 0 SG: 23 NU: 06

Pos Type: Permanent Location: 0110 Albany

Pos Estab: 02/06/1997 Pos Ends:

Rate: Fund: GEN Phi Tag: 52.6: Y CSC Exr: Frozen: Y Waiver: N Waiver Ends:

Earmarks
CC: DOB:
CSC: AGY: N

There is an unprocessed sep panel for employee 888888888

INCUMBENTS View All First 1 of 1 Last

Title:	55:	JC:	SG:	NU:	FT/PT/MR/HR:	PT/MR %:
Appv Ends:	Appt Status:	Spcty:				
Action/Rsn:	Prob Ends:					

INCUMBENTS View All First 1 of 1 Last

Title:	55:	JC:	SG:	NU:	FT/PT/MR/HR:	PT/MR %:
Action/Rsn:	Appt Status:	Leave Begins:	Leave Ends:			

[Position Summary](#)

[Return to Search](#)

If an agency has not submitted, or DCS has not processed the worklist item for a system generated separation, there will be a SEP row in the employee's history but the reason will be blank until the worklist item is processed.

NYSTEP Home Worklist Reports Help

Home > NY Personnel Management > Incumbent Change Request > Inquire > Employee History [New Window](#)

Gensep,Worklist SSN: 888888888 Empl Rcd #: 0

Employee History View All First 1-3 of 3 Last

Eff Dt Seq	Action Reason List #	EE Status FT / PT PT / VR %	Status Appt Lvl Vet Crdt	Agency Title Title Code / Message	JC SG NU	Pos # Agy / Line # Action Dt
04/01/2004 1	XAG TR 852.6	Active I F 100	Perm N N	Employ Relatns Assoc Persnl Admr 1441400	0 23 06	00021140 01150 00811 05/04/2004
04/01/2004 0	SEP	Separated I F 100	Cont N N	Civil Service Assoc Staffing Sv Rep 1405400	0 23 06	00036782 08000 15139 05/04/2004
03/29/2001 0	HIR OC 2832500	Active I F 100	Cont N N	Civil Service Assoc Staffing Sv Rep 1405400	0 23 06	00036782 08000 15139 05/04/2004

[Employee Availability](#)

[Return to Search](#)