

Worklist Overview

What is a Worklist?

A **Worklist** is your HRIS "to-do" list. When an HR event requires your attention, you will receive a notification to take action on the HRIS Management Center. This notification or "to-do" item will remain until you mark it worked. This document will explain each HR event notification and what you should do when you receive these.

What types of Worklist items will I receive?

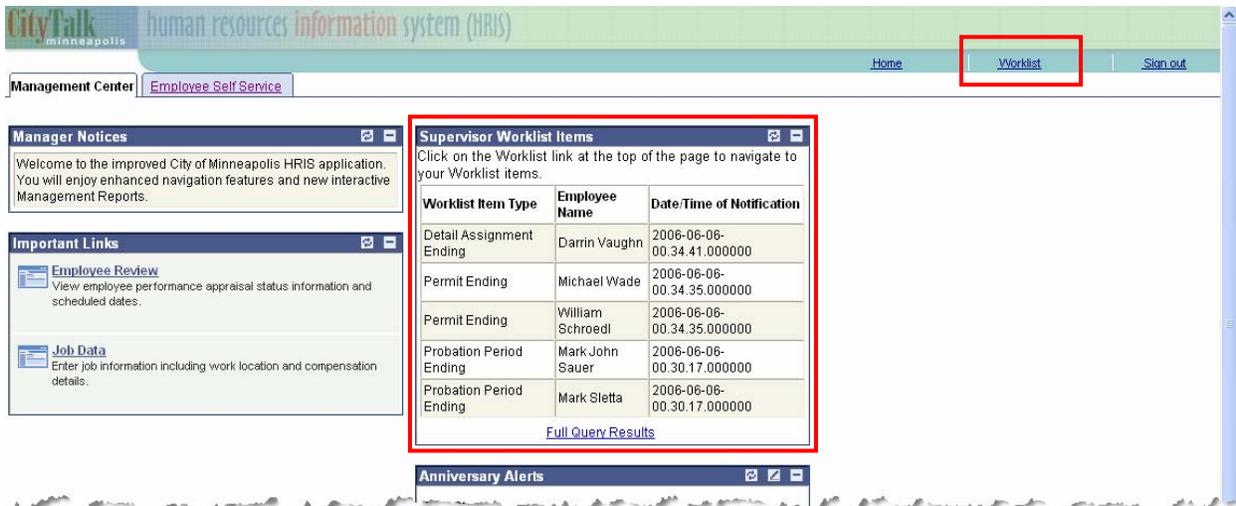
As a Supervisor, you will receive the following Worklist items:

- Probation Period Ending
- Permit Ending
- Detail Assignment Ending
- Performance Appraisal Due
- License/Certification Expiring – **New**
- Drivers License Expiring – **New**

How do I access my Worklist?

You can access your Worklist from the Management Center page in HRIS.

Note: Your Management Center page may appear a bit different then the example below depending on your role in the organization.



Supervisor Worklist Items pagelet

The Supervisor Worklist Items pagelet displays a snapshot of the items that are currently in your Worklist. Only the most recent five notifications are displayed on the pagelet, but you can see a full list of items by selecting the [Full Query Results](#) link.

Supervisor Worklist Items

Click on the Worklist link at the top of the page to navigate to your Worklist items.

a Worklist Item Type	b Employee Name	c Date/Time of Notification
Detail Assignment Ending	Darrin Vaughn	2006-06-06-00.34.41.000000
Permit Ending	Michael Wade	2006-06-06-00.34.35.000000
Permit Ending	William Schroedl	2006-06-06-00.34.35.000000
Probation Period Ending	Mark John Sauer	2006-06-06-00.30.17.000000
Probation Period Ending	Mark Sletta	2006-06-06-00.30.17.000000

[Full Query Results](#)

- a** Describes the type of Worklist Item
- b** The Person who sent you the Worklist Item
- c** The time the Worklist Item was assigned to you.

Working on your Worklist tasks

Step 1: You can get to the Worklist details by selecting the Worklist link in the upper right corner.

The screenshot shows the HRIS interface with the following components:

- Header:** CityTalk Minneapolis human resources information system (HRIS). Navigation links: Home, **Worklist** (highlighted), Sign out.
- Management Center:** Employee Self Service.
- Manager Notices:** Welcome to the improved City of Minneapolis HRIS application. You will enjoy enhanced navigation features and new interactive Management Reports.
- Important Links:**
 - Employee Review:** View employee performance appraisal status information and scheduled dates.
 - Job Data:** Enter job information including work location and compensation details.
- Supervisor Worklist Items:** A table with columns: Worklist Item Type, Employee Name, Date/Time of Notification. It contains the same five rows as the previous table. Below the table is a [Full Query Results](#) link.
- Anniversary Alerts:** (Section header visible at the bottom).

Step 2: You are brought to the Worklist details page in HRIS.

Worklist for Portal_Supervisor: Portal Supervisor

#	Item	Description
a	Work List Filters	This allows you to filter your list by the item selected.
b	Worklist Items	Each line displays a separate Worklist item.
c	Link	Selecting the link will bring you into the page where you can view employee details that triggered the Worklist notification.
d	Mark Worked	This allows you to manually remove the item from your Worklist. Worklist notifications should not be removed from your list until after you have taken appropriate steps to address the HR event.

Step 3: You can work on your Worklist items by selecting the link or navigating to the page. The details of the actions you may need to take are in the following section.

Worklist Item Details

Probation Period Ending

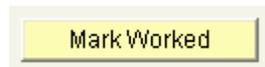
Workflow is triggered when an employee’s probation period is ending in **60 days**. You can view the Probation Date by clicking on the employee’s name in your Worklist.

Employment Information					
James P Fedor	EMP	ID:	096097	Empl Rcd #:	0
Organizational Instance					
Organizational Instance Rcd:	0	Original Start Date:	11/24/1998	<input type="checkbox"/> Override	
Last Start Date:	11/24/1998	First Start Date:	11/24/1998		
Termination Date:	01/01/2000	Years Months Days			
Org Instance Service Date:	11/24/1998	<input type="checkbox"/> Override	1	1	8
Organizational Assignment Data					
Instance Record					
Last Assignment Start Date:	11/24/1998	First Assignment Start:	11/24/1998		
Assignment End Date:	01/01/2000				
Home/Host Classification:	Home	Years Months Days			
Company Seniority Date:	11/24/1998	<input type="checkbox"/> Override	1	1	8
Benefits Service Date:	11/24/1998	<input type="checkbox"/> Override	1	1	8
Seniority Pay Calc Date:	11/24/1998	<input type="checkbox"/> Override	1	1	8
Probation Date:	<input type="text" value="12/1/2006"/>	Leave Accrual Date:	<input type="text" value="11/24/1998"/>		
Professional Experience Date:	<input type="text" value="11/24/1998"/>	Last Verification Date:	<input type="text"/>		
Business Title:	<input type="text"/>	Position Phone:	<input type="text"/>		

You should work with your HRIS Department Rep or your HR Generalist to:

- Retain the employee – the HRIS Dept Rep should enter probation complete in the employee’s Job record, or
- Extend the probation period – the HRIS Dept Rep should update the probation date, or
- Terminate the employee – the HRIS Dept Rep should terminate the employee’s Job record.

To remove the Worklist item, you must click the “Mark Worked” button on your Worklist page.



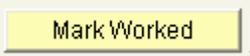
Permit Ending

Workflow is triggered when an employee's temporary employment period is ending in **30 days**. You can view the Expected Job End Date by clicking on the employee's name in your Worklist.

The screenshot shows the HRIS interface for an employee named James P Fedor. At the top, there are navigation tabs: Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. Below the tabs, the employee's name, EMP, ID: 096097, and Empl Rcd #: 0 are displayed. A 'Work Location' section contains a search bar and navigation controls. The main area shows employee details: HR Status: Active, Payroll Status: Suspended, Effective Date: 01/01/2006, Sequence: 0, Job Indicator: Primary Job, Action / Reason: Pay Rate Change, and Termination Date: 01/01/2000. The 'Expected Job End Date' is 11/24/2040, which is highlighted with a red box. An 'Expected Return Date' field is also present.

You should work with your HR Generalist to inquire about a Letter of Agreement to extend the permit if needed.

To remove the Worklist item, you must click the “Mark Worked” button on your Worklist page.



Detail Assignment Ending

Workflow is triggered when an employee's additional assignment is ending in **30 days**. You can view the Expected Job End Date by clicking on the employee's name or navigating in your Worklist.

James P Fedor EMP ID: 096097 Empl Rcd #: 0

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Find First 1 of 1 Last

HR Status: Active Payroll Status: Suspended

Effective Date: 01/01/2006 Sequence: 0 Job Indicator: Primary Job

Action / Reason: Pay Rate Change Collective Bargain Agreer

Last Start Date: 11/24/1998 Termination Date: 01/01/2000

Expected Job End Date: 11/24/2040

Expected Return Date:

You should work with your HR Generalist to inquire about a Letter of Agreement to extend the detail assignment if needed.

To remove the Worklist item, you must click the “Mark Worked” button on your Worklist page.



Performance Appraisal Due

Workflow is triggered when an employee’s review period ends in **30 days**. You can view the employee review period details by clicking on the employee’s name in your Worklist.

Employee Review

Kristine Scheurle EMP ID: 096326 Empl Rcd #: 0

Business Unit:	MPLMN	Minneapolis MN	Company:	MPL
Department:	MPLS865	News & Radio Department	Position:	00005046
Job Code:	02630C	Conv Ctr Ops Maint Specialist-C		
Empl Status:	A	Regular/Temporary: R	Full/Part Time:	F

Review Details Find | View All First 1 of 3 Last

From Date	*To Date	*Review Type	*Review Status
07/01/2006	06/30/2007	Annual	Scheduled

You should complete and conduct an employee review, then complete an employee Job Change Form for your Department HRIS Rep to update your employee’s HRIS record. Your HRIS Rep will also enter the next review period in HRIS.

To remove the Worklist item, you must click the “Mark Worked” button on your Worklist page.

License/Certification Expiring

Workflow is triggered when an employee has a license or certification on file in HRIS with an expiration date in **30 days**. Expiration notifications will only be sent for licenses or certifications that are required for the employee’s job (as defined by Employee Classifications). You can view the employee’s license/certification detail by clicking on the employee’s name in your Worklist.

Licenses and Certifications

Crystal O Dejarlais **Person ID:** 061643

Licenses and Certifications		Find View All	First 1 of 1 Last
License/Certificate Code:	CT0028	HAZMATCertification	Competency
Issue Date:	09/15/2006		
License #:	X12345		
Issued By:	State of MN		
Expiration Date:	09/15/2007		
	<input type="checkbox"/> License Verified <input type="checkbox"/> Renewal in Progress		
Issued In			
Country:	USA	State:	

You should contact your employee and let them know to ensure that all requirements of the license or certification are maintained prior expiration. The employee should provide proof of the license/certification renewal to a Department Administrator so the expiration data can be updated in HRIS. The employee also has the ability to update the expiration data using Employee Self Service.

To remove the Worklist item, you must click the “Mark Worked” button on your Worklist page.



Driver's License Expiring

Workflow is triggered when an employee has a driver's license on file in HRIS with an expiration date in **30 days**. Expiration notifications will only be sent for driver's licenses that are required for the employee's job (as defined by Employee Classifications). You can view the driver's license detail by clicking on the employee's name in your Worklist.

Drivers License

Crystal O Dejarlais Person ID: 061643

Driver's License Information
Find | View All | First 1 of 1 Last

Driver's License #:	B123456890	
Country:	USA	United States
State:	MN	Minnesota
Issue Location:	Issuing Authority: State of MN	
Valid from/to:	06/01/2005	06/01/2009
Number of Violations:	0	Number of Points: 0 <input type="checkbox"/> License Suspended
Comment:	<input style="width: 90%;" type="text"/>	

License Type
Find | View All | First 1 of 1 Last

License Type: Commercial Drivers Licenses would be listed here as Class A, B or C

You should contact your employee and let them know to ensure that all requirements of the driver's license are maintained prior expiration, including any commercial driver's requirements. The employee must provide proof of the license renewal to a Department Administrator so the expiration data can be updated in HRIS.

To remove the Worklist item, you must click the "Mark Worked" button on your Worklist page.

