

# Completing Workflow Tasks

Once a user completes a workflow task, the document in the workflow is automatically sent on to the next person(s) in the sequence order. Once you have completed your task in a workflow, it is critical that you mark the task as completed so the workflow can move on.

A user can complete a workflow task from four different places in PinPoint:

## Using the Document Quick View

The screenshot displays the PinPoint interface for document management. The main window shows a document titled "Employment Eligibility Verification" (USCIS Form I-9) from the Department of Homeland Security. The form includes sections for employee information and attestation. The sidebar on the right shows the document's metadata and workflow details. A red checkmark in the sidebar indicates that the workflow task is completed.

**Document Metadata:**

- Doc Name: Adrienne Gorrie I-9
- Doc Date: 01/04/2021
- Doc Status: Checked-In
- Cabinet: HR Employee Files
- Folder: Adrienne Gorrie
- Sub-Divider: Completed Forms
- Doc Type: I-9

**Workflow Details:**

- Workflow: John's Workflow
- Workflow Status: <-- Select -->
- Delayed Workflow: <-- Select -->
- Bridge: <-- Select -->
- Variable Name: <-- Select -->

**Form Fields:**

**Section 1. Employee Information and Attestation** (Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)

Last Name (Family Name) \_\_\_\_\_ First Name (Given Name) \_\_\_\_\_ Middle Initial \_\_\_\_\_ Other Last Names Used (if any) \_\_\_\_\_

Address (Street Number and Name) \_\_\_\_\_ Apt. Number \_\_\_\_\_ City or Town \_\_\_\_\_ State \_\_\_\_\_ ZIP Code \_\_\_\_\_

Date of Birth (mm/dd/yyyy) \_\_\_\_\_ U.S. Social Security Number \_\_\_\_\_ Employee's E-mail Address \_\_\_\_\_ Employee's Telephone Number \_\_\_\_\_

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

- 1. A citizen of the United States
- 2. A noncitizen national of the United States (See instructions)
- 3. A lawful permanent resident (Alien Registration Number/USCIS Number): \_\_\_\_\_
- 4. An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy): \_\_\_\_\_

Some aliens may write "N/A" in the expiration date field. (See instructions)

Aliens authorized to work must provide only one of the following document numbers to complete Form I-9:  
An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.

OR Code - Section 1  
Do Not Write In This Space

1. Alien Registration Number/USCIS Number: \_\_\_\_\_  
OR  
2. Form I-94 Admission Number: \_\_\_\_\_  
OR  
3. Foreign Passport Number: \_\_\_\_\_  
Country of Issuance: \_\_\_\_\_

**Form Footer:**

- Date Added: 01/04/2021
- Last Edited: 06/23/2022
- Last User: jsmith

**Workflow Sidebar:**

- Save Doc Only
- Save Metadata Only
- Save Doc & Metadata
- Doc Name: Adrienne Gorrie I-9
- Doc Date: 01/04/2021
- Doc Status: Checked-In
- Cabinet: HR Employee Files
- Folder: Adrienne Gorrie
- Sub-Divider: Completed Forms
- Doc Type: I-9
- I-9 Fields: Values
- Description: Employee Needs to Complete
- Workflow: John's Workflow
- Workflow Status: <-- Select -->
- Delayed Workflow: <-- Select -->
- Delayed Date: \_\_\_\_\_
- Bridge: <-- Select -->
- Bridge Value: \_\_\_\_\_
- Variable Name: <-- Select -->
- Variable Naming:
- Workflow Rules:
- Merge Front:
- Merge End:
- Notes: \_\_\_\_\_
- Discussion: submitted online (John Smith)
- Reply: [icon]
- Timestamp: 4/12/2022 11:24:29 AM

From any page in PinPopint where documents are visible, click the DocID to open a Quick View of the document.

## Using the File Review Page

fx [Icons]

\* Doc Name: Adrienne Gorrie I-9

\* Doc Date: 01/04/2021 Doc Status: Checked-In

\* Cabinet: HR Employee Files

\* Folder: Adrienne Gorrie Search Folder

\* Sub-Divider: Compli Retention Date

\* Doc Type: I-9 Doc Tab: <-- Select Tab -->

I-9 Fields Values

Description: Employee Needs to Complete

Workflow: John's Workflow Workflow Status: <-- Select -->

Delayed Workflow: <-- Sele Delayed Date

Bridge: <-- Select --> Bridge Value

Variable Name: <-- Select -->

Variable Naming  Workflow Rules

Merge Front  Merge End

Notes

Save Doc Only Save Metadata Only Save Doc & Metadata Clear

Home Edit Comment View Form Protect

Hand Select Snapshot Download Print Zoom Out Zoom In Change color

1 (1/3)

Properties

**Employment Eligibility Verification**  
Department of Homeland Security  
U.S. Citizenship and Immigration Services

**USCIS Form I-9**  
OMB No. 1615-0047  
Expires 10/31/2022

▶ **START HERE:** Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

**ANTI-DISCRIMINATION NOTICE:** It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identify. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

**Section 1. Employee Information and Attestation** (Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment**, but not before accepting a job offer.)

Last Name (Family Name)		First Name (Given Name)		Middle Initial	Other Last Names Used (if any)	
Address (Street Number and Name)			Apt. Number	City or Town		State ZIP Code
Date of Birth (mm/dd/yyyy)	U.S. Social Security Number		Employee's E-mail Address		Employee's Telephone Number	

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

1. A citizen of the United States

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Some aliens may write "N/A" in the expiration date field. (See instructions)

Aliens authorized to work must provide only one of the following document numbers to complete Form I-9:  
An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.

QR Code - Section 1  
Do Not Write in This Space

You can complete your task by clicking the workflow button, located on the left side of the File Review page.

## Using the Classic Dashboard

Recent Documents Checked-Out Documents Document Workflows Non-Document Workflows

Workflow	Task	DocID	Doc Name	Start Date	Due Date
John's Workflow	Review & Sign	fx 4257	Adrienne Gorrie I-9	06/23/2022	06/26/2022

When you are using the Classic Dashboard, simply click the workflow button to complete your workflow task.

## Using the My Workflows Page

Personal  Private  Default

Workflow: <-- Select --> Task: <-- Select --> Doc Name: Search Folder: Sub-Divider: <-- Select -->

Cabinet: <-- Select Cabinet --> Folder: <-- Select --> Search: Doc Type: <-- Select Doc Type --> Doc Tab: <-- Select --> Content: Metadata: <-- Select -->

Doc Date: Doc Date: Status: All List Next: All

Document Tasks Non-Document Tasks

fx [Icons] Change Status

Action	Workflow	Task	Assign Date	Due Date	Doc Date	DocID	Doc Name	Cabinet	Folder	Sub-Divider	Doc Type	1st Field	2nd Field	3rd Field	Workflow Status
<input type="checkbox"/> fx	John's Workflow	Review & Sign	06/23/2022	06/26/2022	01/04/2021	4257	Adrienne Gorrie I-9	HR Employee Files	Adrienne Gorrie	Completed Forms	I-9	Employee Needs to Complete			<-- Select -->

When you are using the My Workflows page, you can either complete one workflow task at a time, or complete multiple workflow tasks at once.

To complete multiple workflows tasks at once, select the workflow tasks you would like to complete under the Action column, then click the Fx button located above the task list. From the Fx menu, click the button next to Complete Workflow.

If you want to complete one workflow task at a time, use the workflow button under the Actions column that is in the same row as the workflow task you want to complete.