Using a Checklist Overview

Cardinal Checklist functionality is used across the commonwealth to track and audit tasks when entering a New Hire, a Leave of Absence, and a Termination on an employee's Cardinal Job Record. The checklist enables audit departments to confirm when tasks are completed and recorded in Cardinal HCM.

When the user selects a Checklist, the Checklist items populate, allowing the user to "record" a change in status per item when the task has been initiated, completed, notified, and/or received.

COVHIR – Hire
When completing a new hire, use the New Hire Checklist to validate tasks are completed during the new employee onboarding.

COVLOA – Leave of Absence
When putting an employee on Leave of Absence, use the Leave of Absence Checklist to validate tasks are completed when entering a Leave of Absence on the employee's job record.

COVTER – Terminate
When completing a termination, use the Terminate Checklist to validate tasks are completed when entering a Termination on the employee's job record.

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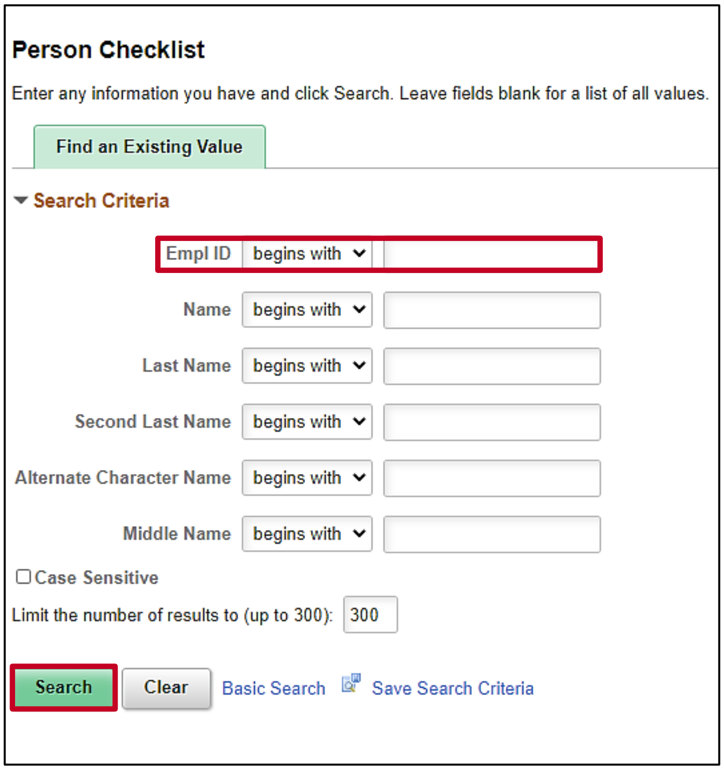
Accessing a Checklist

This overview uses the New Hire Checklist as an example. When completing a new hire, access and use the New Hire Checklist to validate tasks are completed prior to the new employee's start date.

1. Navigate to the **Person Checklist** page using the following path:

   Navigator > Workforce Administration > Personal Information > Organizational Relationships > Person Checklist

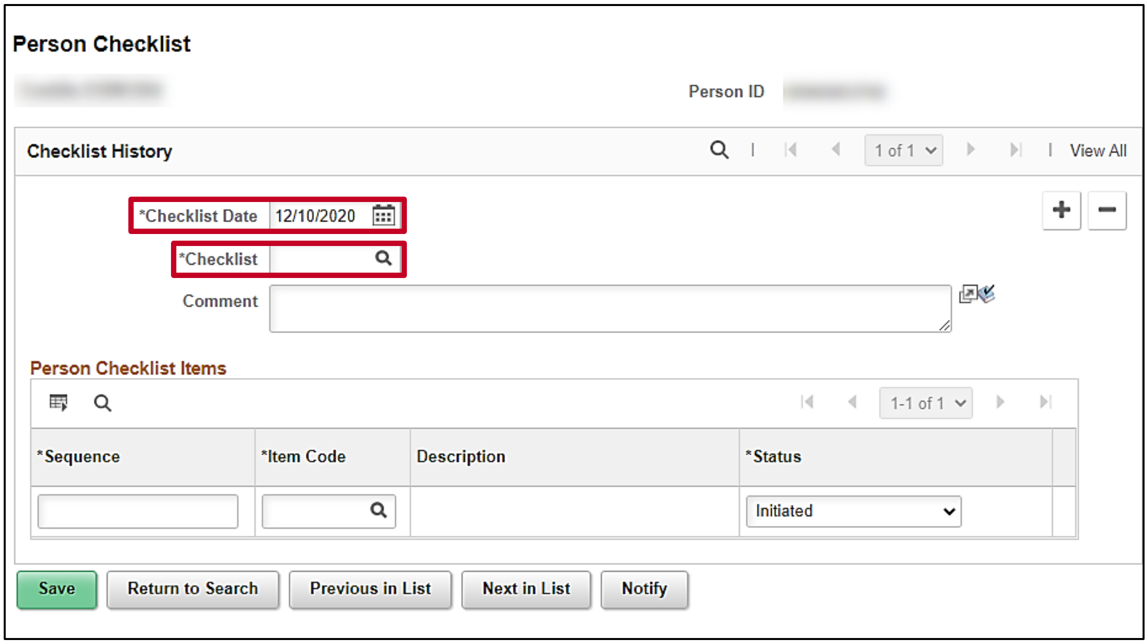
The **Person Checklist Search** page displays.



2. Enter the Employee ID in the **Empl ID** field to search for the applicable employee.
3. Click the **Search** button.

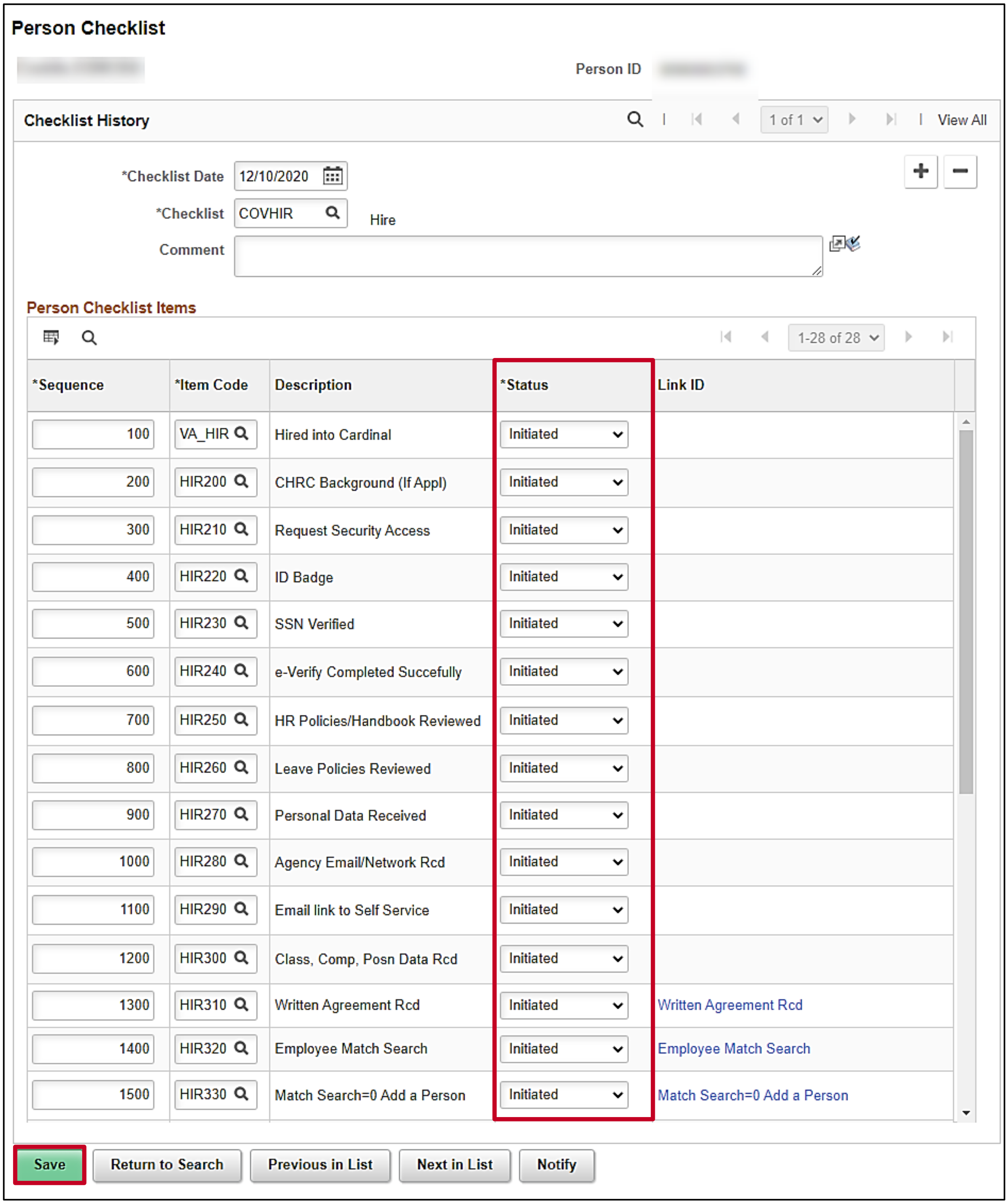
   Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. For further information on searching for employees, refer to the WBT titled **NAV205_Navigation in Cardinal HCM**. This WBT can be found on the Cardinal website under **Learning**. Cardinal security restrictions only allow users to view their agency employees.

The **Person Checklist** page displays.



4. The **Checklist Date** field defaults to the current system date. Update this date to the date the checklist was created using the **Calendar** icon.
5. Select the applicable Checklist using the **Checklist Look Up** icon.

The **Person Checklist** page refreshes and the applicable Checklist displays (below is an example of the **COVHIR - New Hire Checklist**) with the applicable tasks.



6. The **Status** field defaults to "**Initiated**". Click the corresponding **Status** drop-down button and select the applicable status (i.e., **Completed**, **Initiated**, **Received**, **Notified**) to update individual tasks.

7. Click the **Save** button.

   Note: All checklist items should have a status of "Completed" for the Checklist to be considered complete and valid.