

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.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

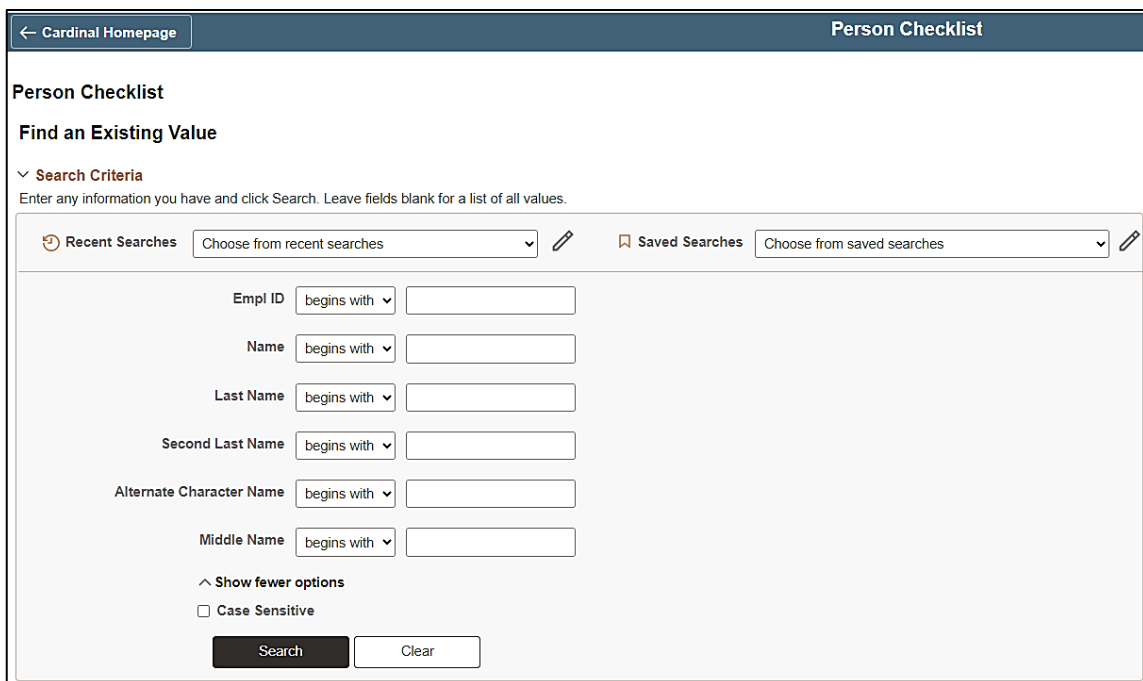
Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1 ; after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.


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.

Step	Action
1.	Navigate to the Person Checklist page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > Person Checklist








The **Person Checklist Find an Existing Value** page displays.



	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
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2.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
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Empl ID begins with ▾

Step	Action
3.	Click the Search button. <div data-bbox="292 378 1003 478" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 2px solid red; padding: 2px 10px; background-color: #333; color: white; font-weight: bold;">Search</div> <div style="border: 1px solid gray; padding: 2px 10px;">Clear</div> </div> </div>
	If multiple employees match the search criteria entered, the search results display in the bottom portion of the page. Select the applicable employee by clicking the Drill In icon for the corresponding row.
<p>The Person Checklist page displays.</p> <div data-bbox="203 699 1437 1060" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Person Checklist</p> <p>Person ID </p> <hr/> <p>Checklist History 1 of 1 View All</p> <p>*Checklist Date <input type="text" value="07/01/2024"/> </p> <p>*Checklist <input type="text" value="COVHIR"/> </p> <p>Comment <input type="text" value="Hire"/>  </p> </div>	
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. <div data-bbox="292 1178 826 1268" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>*Checklist Date <input type="text" value="07/01/2024"/> </p> </div>
5.	Select the applicable Checklist using the Checklist Look Up icon. <div data-bbox="292 1356 755 1446" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>*Checklist <input type="text" value="COVHIR"/> </p> </div>



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

Person Checklist

Person ID

Checklist History Q | < << 1 of 1 >> > | View All


*Checklist Date + -

*Checklist

Comment

Person Checklist Items 1-28 of 28 >> >

*Sequence	*Item Code	Description	*Status	Link ID
<input type="text" value="100"/>	<input type="text" value="VA_HIR"/> <input style="font-size: 8px;" type="button" value="Q"/>	Hired into Cardinal	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="150"/>	<input type="text" value="HIR190"/> <input style="font-size: 8px;" type="button" value="Q"/>	Transfer from other Agency?	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="200"/>	<input type="text" value="HIR200"/> <input style="font-size: 8px;" type="button" value="Q"/>	CHRC Background (If Appl)	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="300"/>	<input type="text" value="HIR210"/> <input style="font-size: 8px;" type="button" value="Q"/>	Request Security Access	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="400"/>	<input type="text" value="HIR220"/> <input style="font-size: 8px;" type="button" value="Q"/>	ID Badge	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="500"/>	<input type="text" value="HIR230"/> <input style="font-size: 8px;" type="button" value="Q"/>	SSN Verified	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="600"/>	<input type="text" value="HIR240"/> <input style="font-size: 8px;" type="button" value="Q"/>	e-Verify Completed Successfully	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="700"/>	<input type="text" value="HIR250"/> <input style="font-size: 8px;" type="button" value="Q"/>	HR Policies/Handbook Reviewed	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="800"/>	<input type="text" value="HIR260"/> <input style="font-size: 8px;" type="button" value="Q"/>	Leave Policies Reviewed	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="900"/>	<input type="text" value="HIR270"/> <input style="font-size: 8px;" type="button" value="Q"/>	Personal Data Received	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="1000"/>	<input type="text" value="HIR280"/> <input style="font-size: 8px;" type="button" value="Q"/>	Agency Email/Network Rcd	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="1100"/>	<input type="text" value="HIR290"/> <input style="font-size: 8px;" type="button" value="Q"/>	Email link to Self Service	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="1200"/>	<input type="text" value="HIR300"/> <input style="font-size: 8px;" type="button" value="Q"/>	Class, Comp, Posn Data Rcd	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	
<input type="text" value="1300"/>	<input type="text" value="HIR310"/> <input style="font-size: 8px;" type="button" value="Q"/>	Written Agreement Rcd	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	Written Agreement Rcd
<input type="text" value="1400"/>	<input type="text" value="HIR320"/> <input style="font-size: 8px;" type="button" value="Q"/>	Employee Match Search	<input type="text" value="Initiated"/> <input style="font-size: 8px;" type="button" value="v"/>	Link ID

Step	Action
6.	<p>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.</p> <div data-bbox="302 443 602 1014" style="border: 1px solid black; padding: 5px;"> <p>*Status</p> <div style="border: 2px solid red; padding: 2px;"> <p>Initiated ▾</p> <p>Initiated ▾</p> <p>Initiated ▾</p> <p>Initiated ▾</p> <p>Initiated ▾</p> </div> </div>
7.	<p>Click the Save button.</p> <div data-bbox="293 1104 1268 1192" style="border: 1px solid black; padding: 5px;"> <div style="border: 2px solid red; padding: 2px; display: inline-block; margin-right: 10px;">Save</div> Return to Search Previous in List Next in List Notify </div>
	<p>All checklist items should have a status of “Completed” for the Checklist to be considered complete and valid.</p>