

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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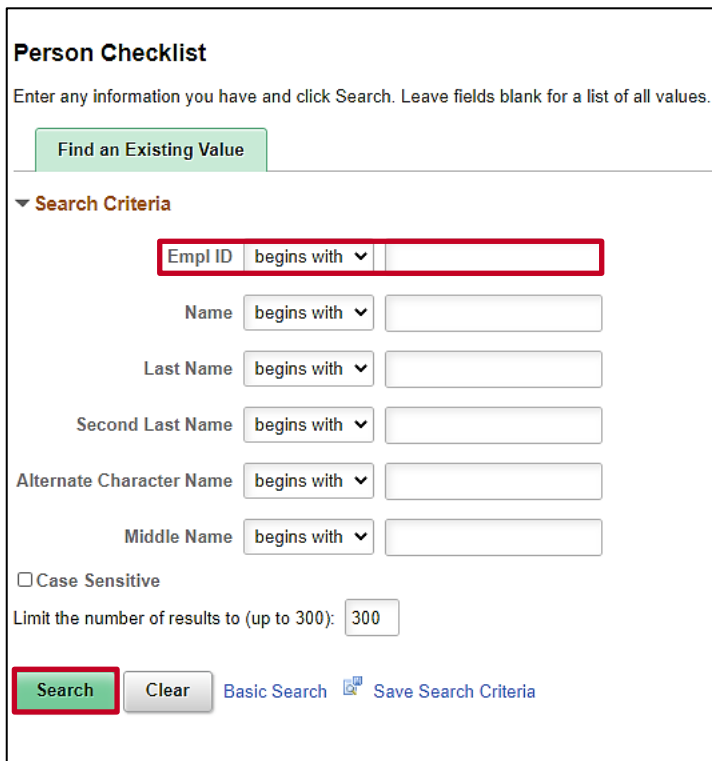
Accessing a Checklist

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.



Person Checklist
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID begins with ▼

Name begins with ▼

Last Name begins with ▼

Second Last Name begins with ▼

Alternate Character Name begins with ▼

Middle Name begins with ▼

Case Sensitive

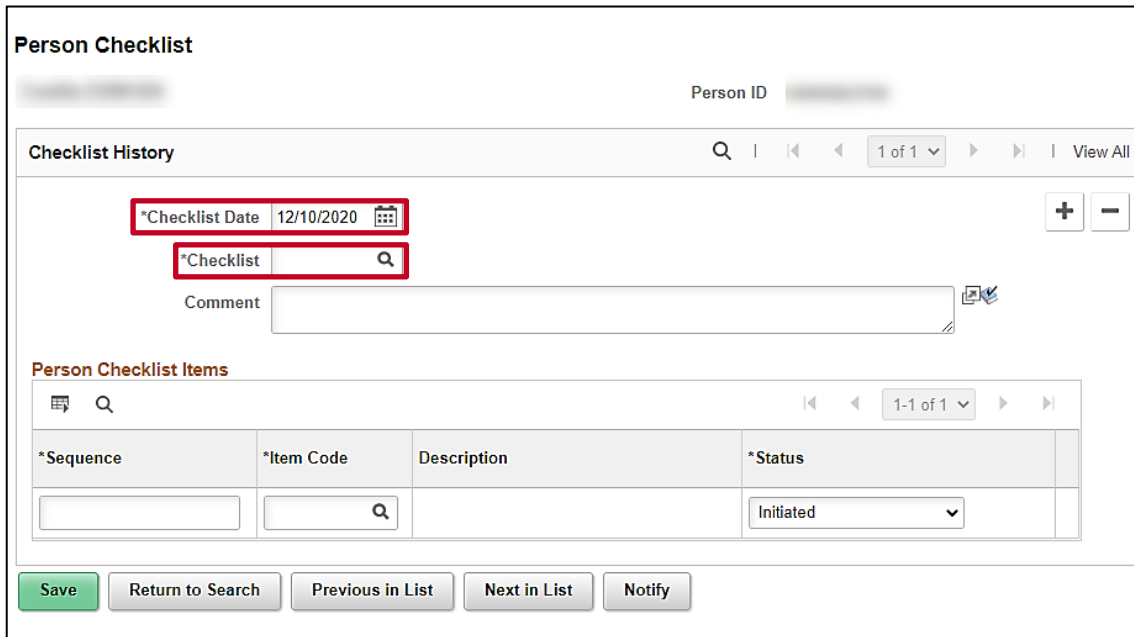
Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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.



The screenshot shows the 'Person Checklist' interface. At the top, there is a 'Person ID' field. Below it is the 'Checklist History' section, which includes a search bar, navigation arrows, and a 'View All' link. The main form area contains fields for '*Checklist Date' (set to 12/10/2020 with a calendar icon), '*Checklist' (with a search icon), and a 'Comment' text area. Below this is the 'Person Checklist Items' section, which features a table with columns for '*Sequence', '*Item Code', 'Description', and '*Status'. The '*Status' column has a dropdown menu currently set to 'Initiated'. At the bottom of the form are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

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.

Person Checklist

Person ID [REDACTED]

Checklist History 1 of 1 | View All

*Checklist Date: 12/10/2020 + -

*Checklist: COVHIR Hire

Comment:

Person Checklist Items 1-28 of 28

*Sequence	*Item Code	Description	*Status	Link ID
100	VA_HIR	Hired into Cardinal	Initiated	
200	HIR200	CHRC Background (If Appl)	Initiated	
300	HIR210	Request Security Access	Initiated	
400	HIR220	ID Badge	Initiated	
500	HIR230	SSN Verified	Initiated	
600	HIR240	e-Verify Completed Successfully	Initiated	
700	HIR250	HR Policies/Handbook Reviewed	Initiated	
800	HIR260	Leave Policies Reviewed	Initiated	
900	HIR270	Personal Data Received	Initiated	
1000	HIR280	Agency Email/Network Rcd	Initiated	
1100	HIR290	Email link to Self Service	Initiated	
1200	HIR300	Class, Comp, Posn Data Rcd	Initiated	
1300	HIR310	Written Agreement Rcd	Initiated	Written Agreement Rcd
1400	HIR320	Employee Match Search	Initiated	Employee Match Search
1500	HIR330	Match Search=0 Add a Person	Initiated	Match Search=0 Add a Person

Save
Return to Search
Previous in List
Next in List
Notify

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.