Checklists

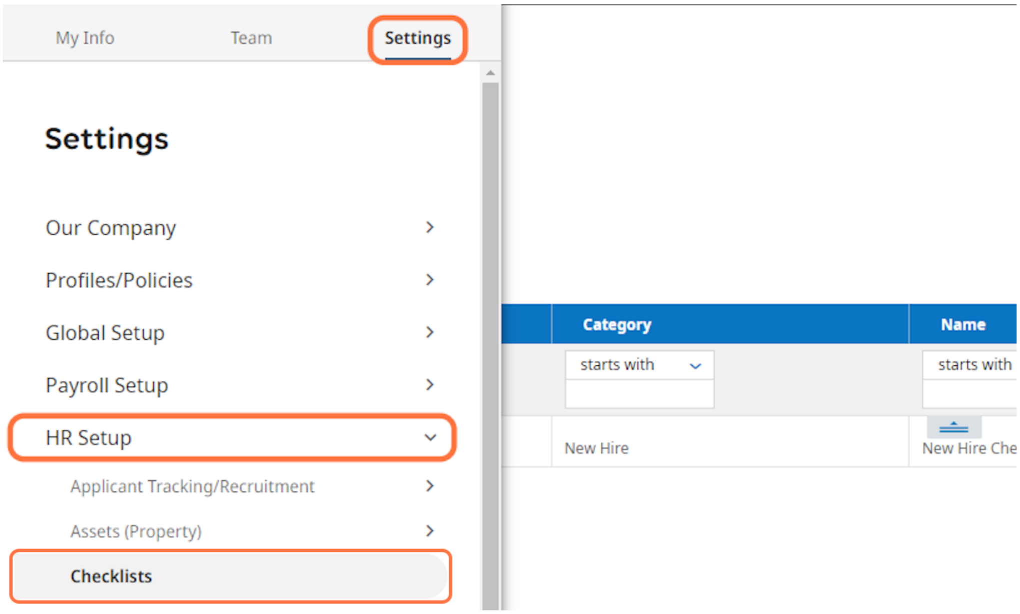
How to create a checklist within Elements

19 Steps [View most recent version](#)

Created by	Creation Date	Last Updated
APS Staff	Mar 14, 2024	Apr 24, 2024

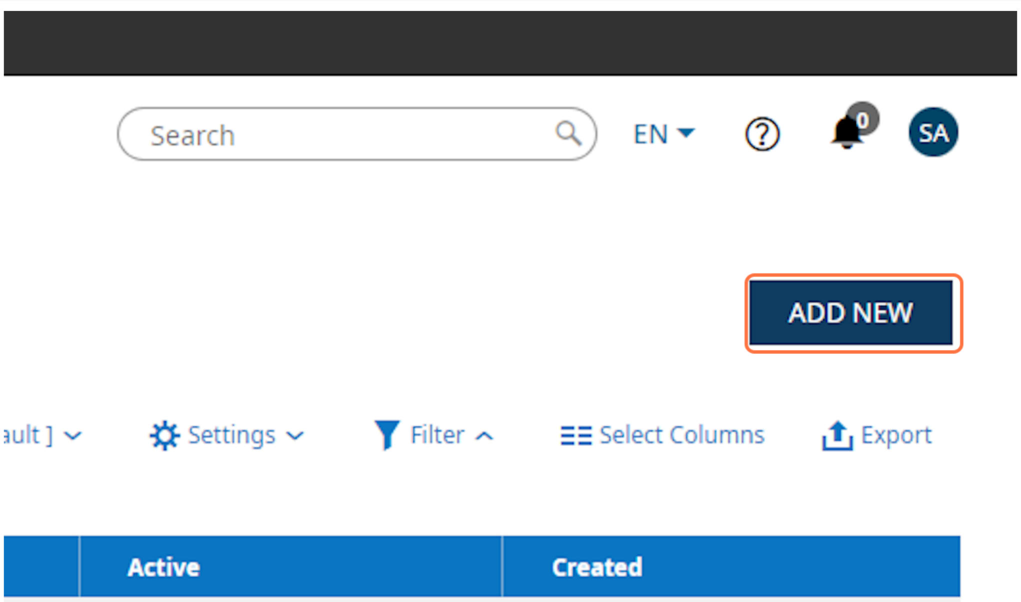
STEP 1

Navigate to the checklist setup: Hamburger Menu > Settings Tab > HR Setup > Checklists



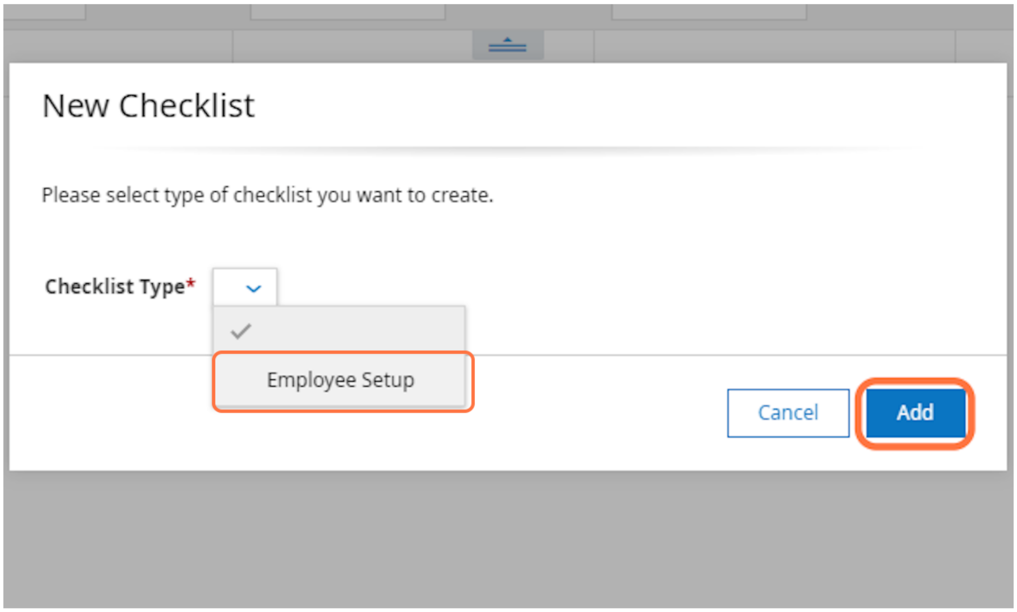
STEP 2

To add a new checklist, select the "ADD NEW" button in the top right corner of the page.



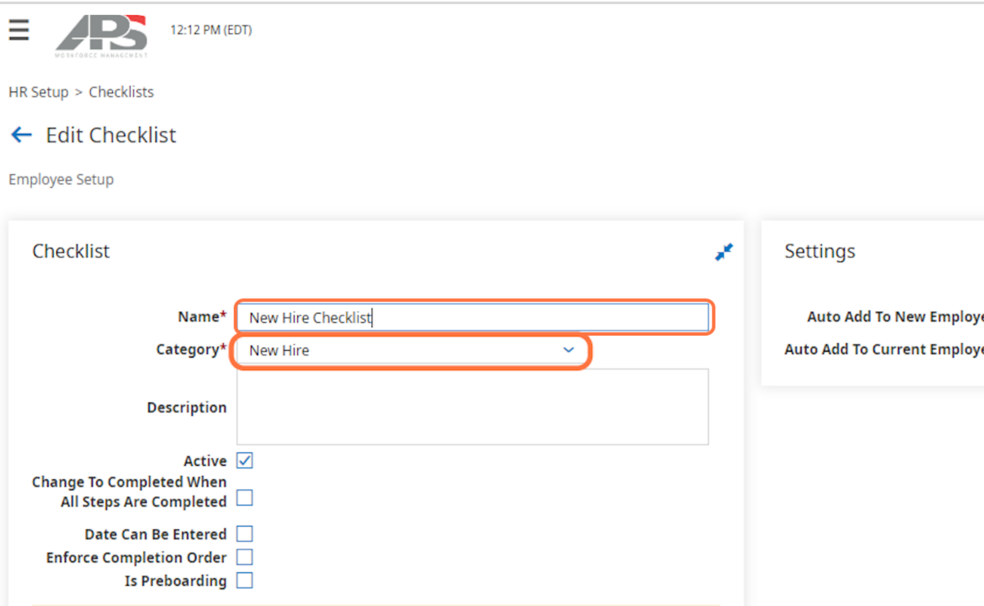
STEP 3

Choose the Checklist Type from the drop-down list, then select Add.



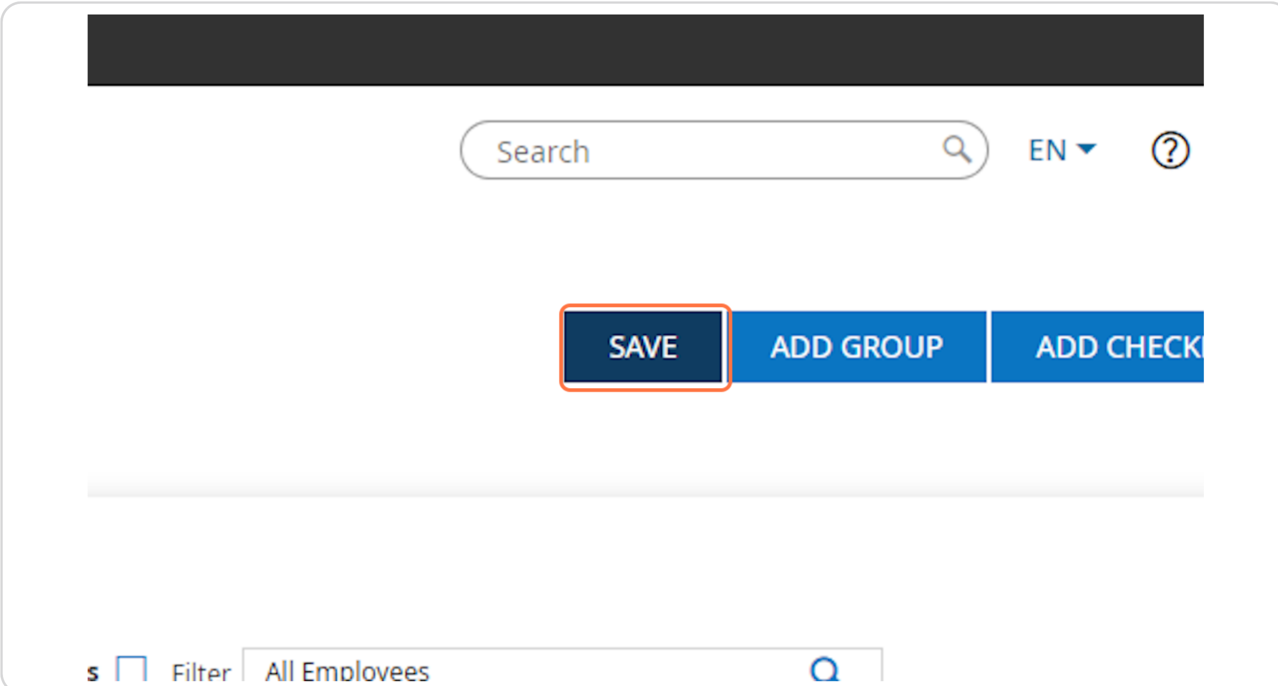
STEP 4

Enter the desired name of the checklist. Select a Category for the checklist, too. If the desired category is not available in the drop down menu, simply type the name of the desired category.



STEP 5

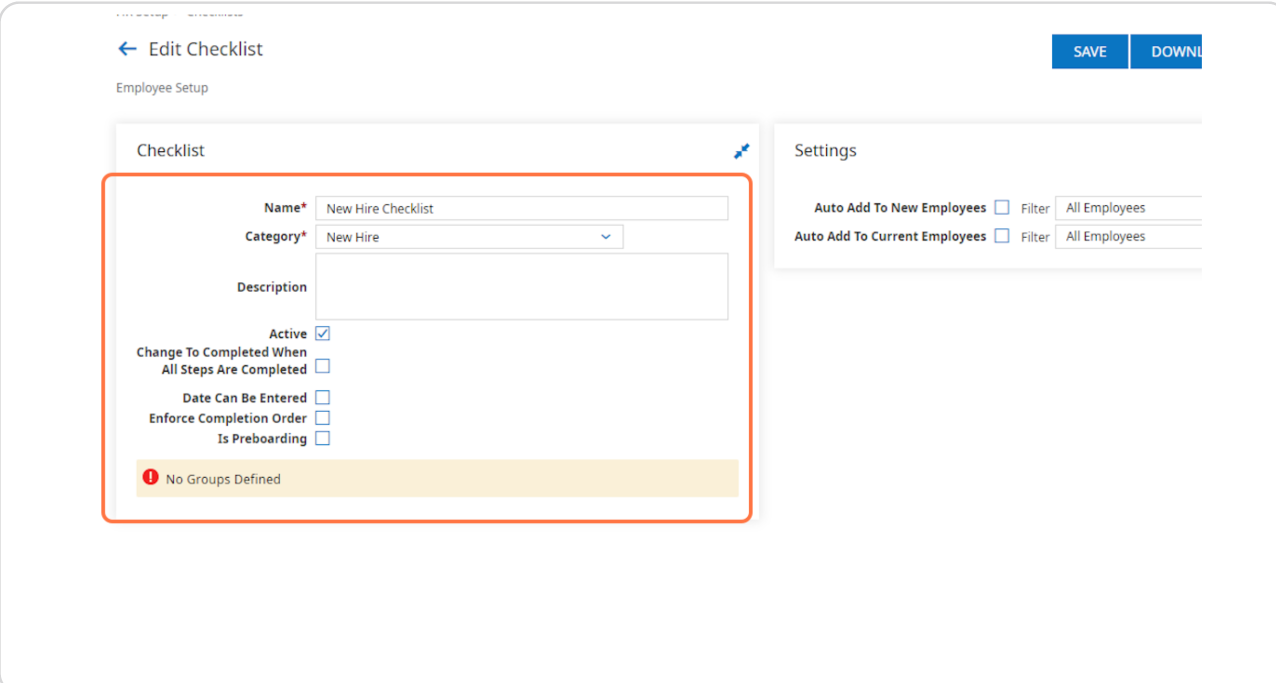
Select Save.



STEP 6

Initial Checklist settings

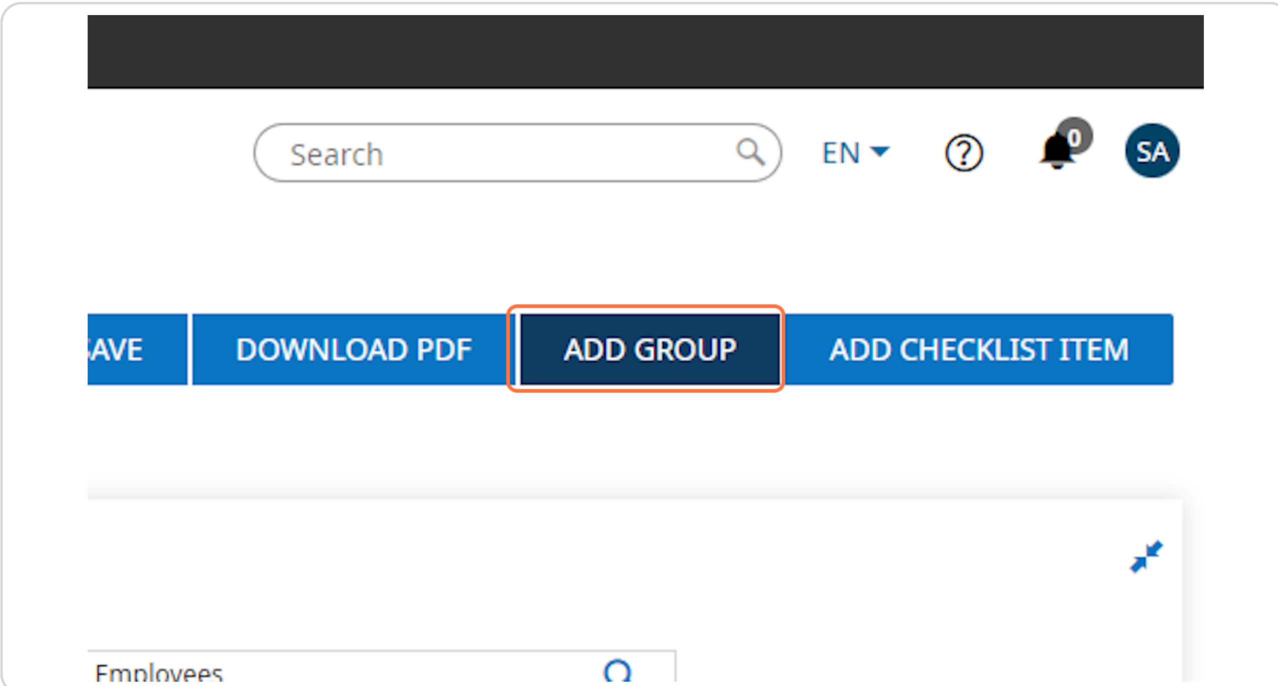
Active: When checked, checklist is active. When unchecked, checklist is inactive and unavailable to use until re-activated.
Change To Completed When All Steps Are Completed: When checked, the checklist status will automatically change to 'completed' when all steps of the checklist are complete.
Enforce Completion Order: Forces employees to complete the checklist steps in the order that they appear. (When unchecked, it allows employees to complete steps of the checklist in any order that they desire.)



STEP 7

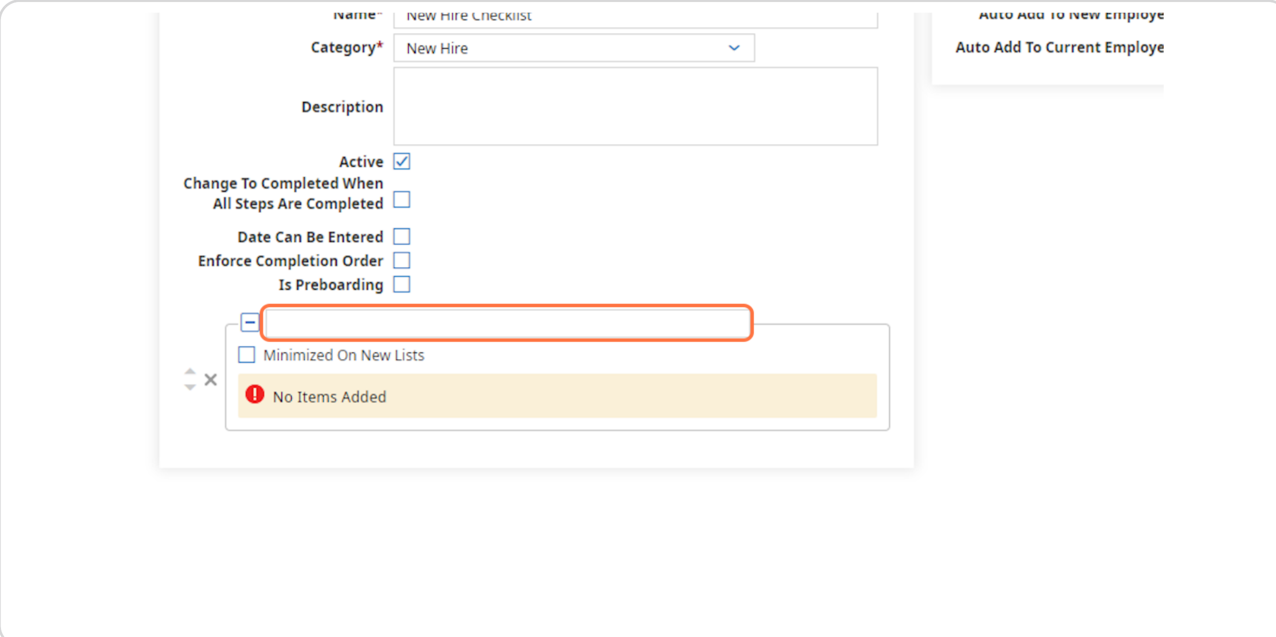
Select the ADD GROUP button to add a group title for tasks.

This "group" feature is most commonly used to create an "Employee Tasks" group, "HR Tasks" group, etc. This is optional, you do not need multiple groups of tasks unless you would like them.



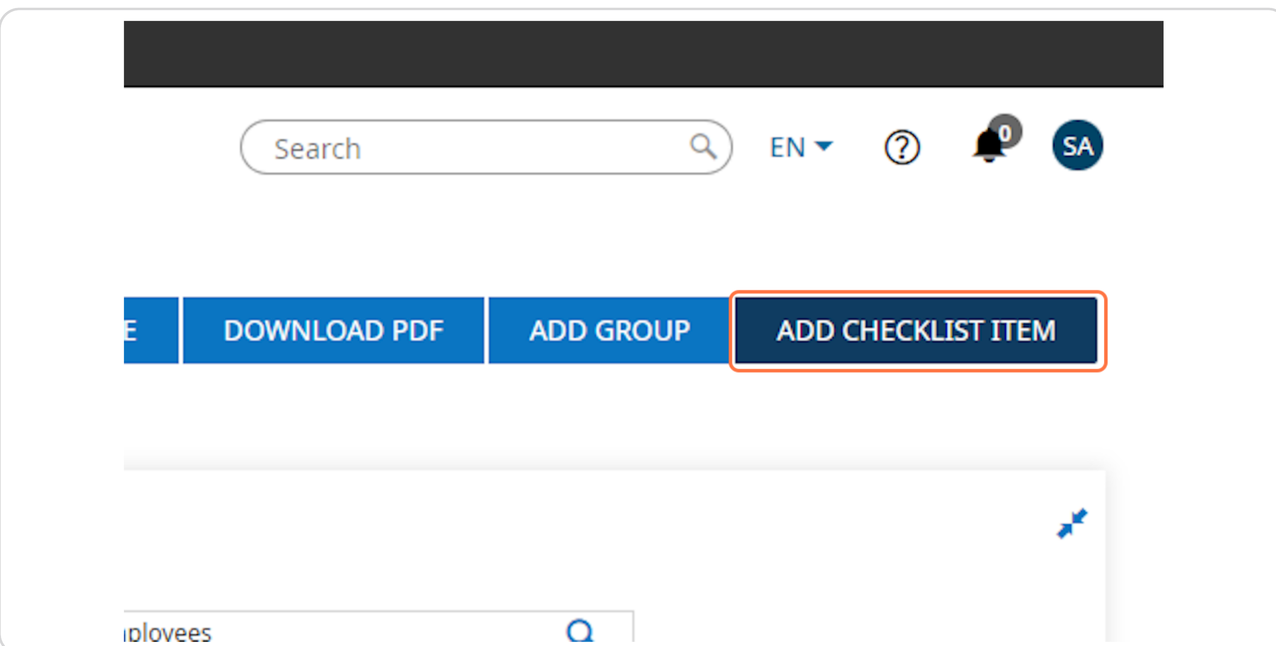
STEP 8

If you choose to add a group, it will appear as shown below. Enter the name of the group(s).



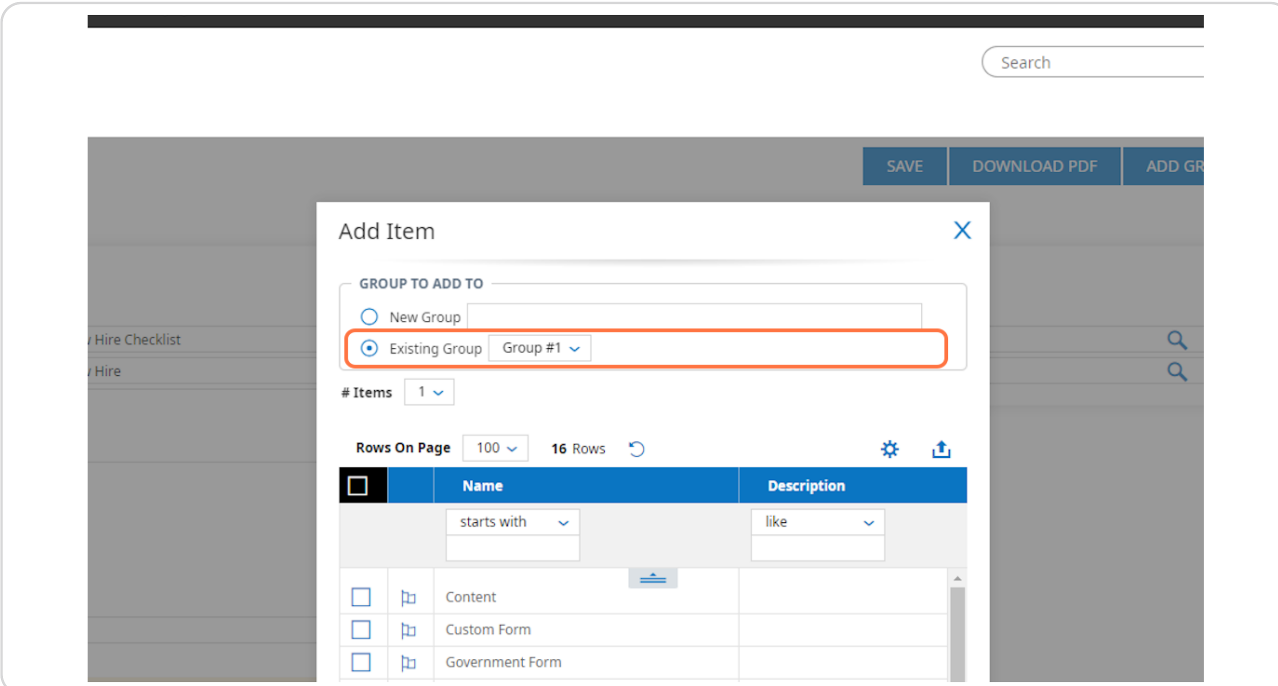
STEP 9

To add items to the checklist, select the ADD CHECKLIST ITEM button.



STEP 10

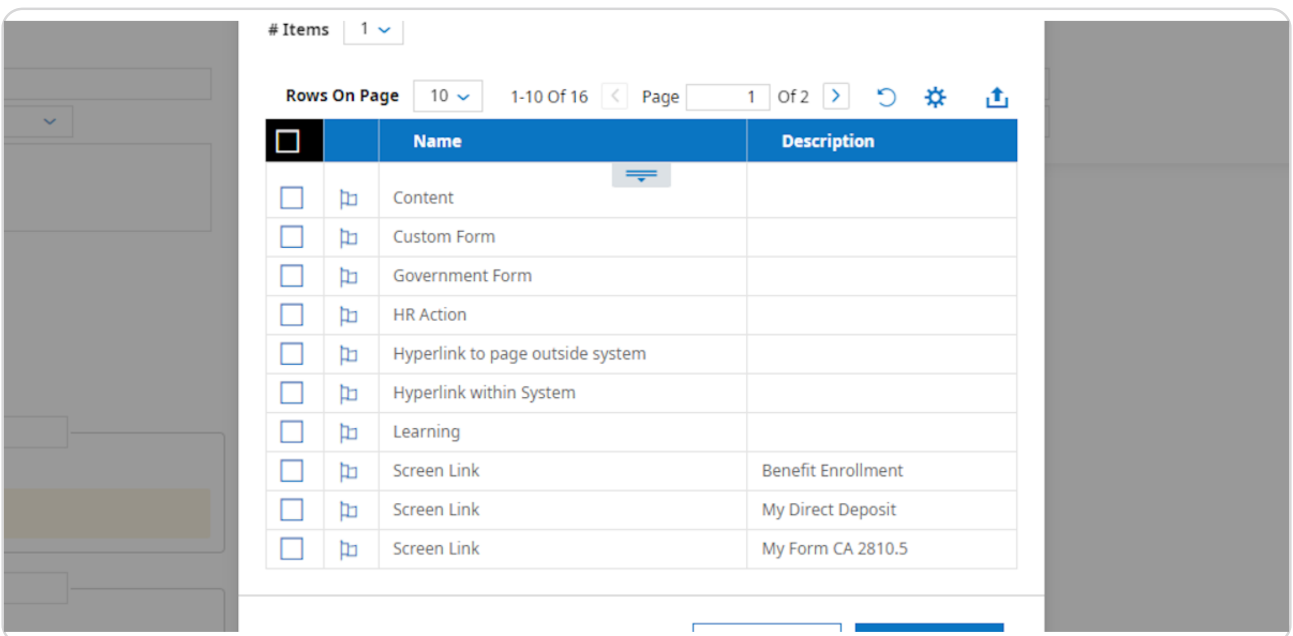
If you have created groups, select the radio button for "Existing Group", then select the group to add the item to. To add the item to a new group, you may select the radio button for "New Group", then enter the name of the new group in the text box.



STEP 11

Available Checklist Items (Part 1)

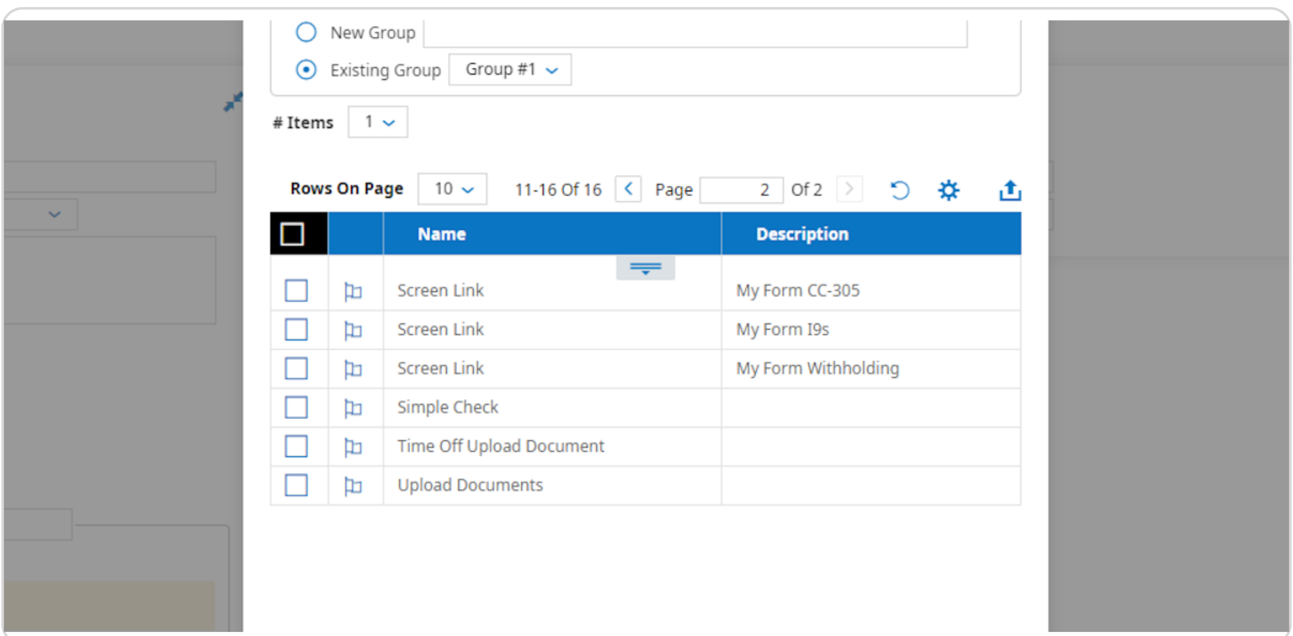
Content: Allows you to add special content, like images, text, videos, links, tables, etc.
Custom Form: Allows you to insert one of the company's custom forms. (*Multiple custom form steps can be added if multiple forms are needed in the checklist*)
Government Form: Provides a link to a government form, like I9, Form W4, state withholding, etc. (*Multiple government forms can be added, if needed.*)
HR Action: Allows you to add a specific HR Action for employees to complete. (*Multiple HR Action steps can be added if employees need to complete multiple HR Actions.*)
Hyperlink to page outside system: Allows you to link an external web page for employees to have quick access to when working through the checklist
Hyperlink within System: Allows you to link an internal page within Elements (a link to Learning:
Screen Link (Benefit Enrollment): Provides a direct link to the benefit enrollment for employees to complete
Screen Link (My Direct Deposit): Provides a direct link to the employees' current direct deposits. (*Must have access to add/edit direct deposits if using this checklist item for employees to configure their direct deposit(s)*)
Screen Link (My Form CA 2810.5): Provides a direct link to Form California Labor Code Section 2810.5 (*Only applicable for employees working in California*).



STEP 12

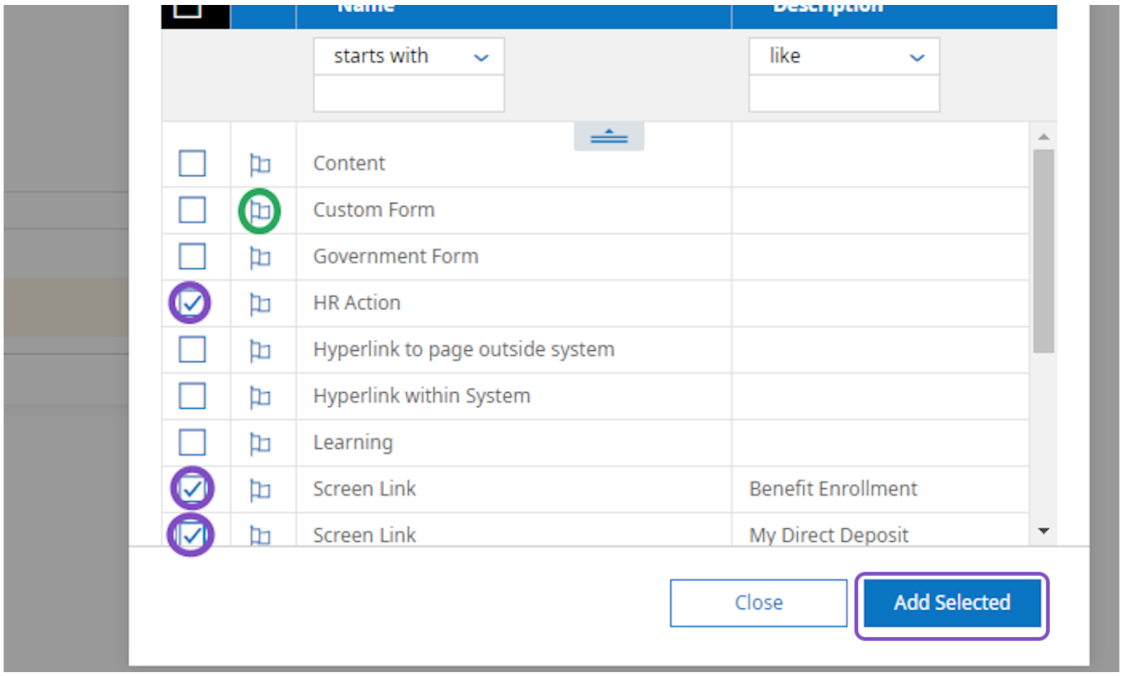
Available Checklist Items (Part 2)

Screen Link (My Form CC-305): Provides a direct link to Form CC-305 (Voluntary Self-Identification of Disability)
Screen Link (My Form I9s): Provides a direct link to Form I-9
Screen Link (My Form Withholding): Provides a direct link to withholding forms, where employees can add and complete multiple withholding forms in the same checklist step (*federal and state withholding, for example*)
Simple Check: Provides a flexible step for admins to use as a "double check". (*For example, it could be used as a reminder step in a "Manager Tasks" group for the manager to assign the employee a badge ID)*
Time Off Upload Document: Allows users to upload time off-related documents. (*This step could be used to upload a copy of the time off policy for employees to review, then simultaneously, employees can upload a list of their pre-planned absences before being hired. A workflow can be attached to this step, too.*)
Upload Documents: This step is specifically designed to allow employees to upload documents to the checklist, which admins or managers could then review after the checklist is complete, if needed.



STEP 13

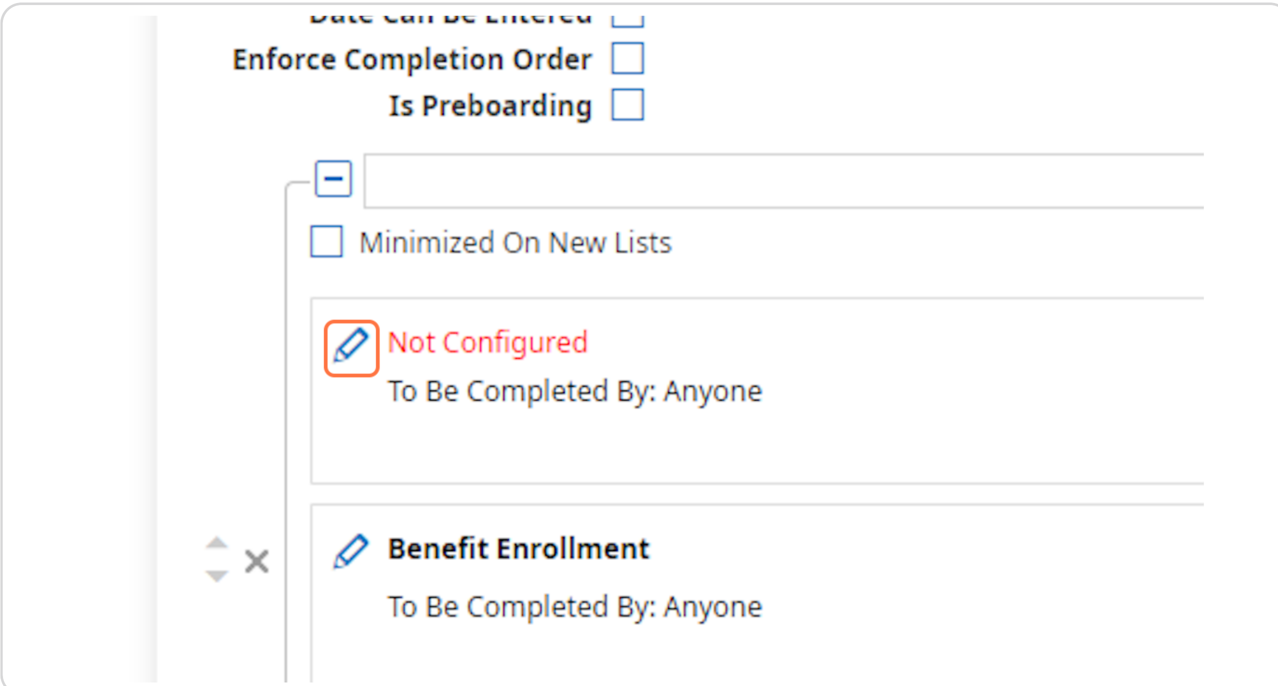
A checklist item can be added individually by selecting the flag icon next to the item. Multiple checklist items can be added at once by checking the box next to the items, then choosing "Add Selected".



STEP 14

Once a checklist item has been added, select the pencil icon on the item to configure its settings.

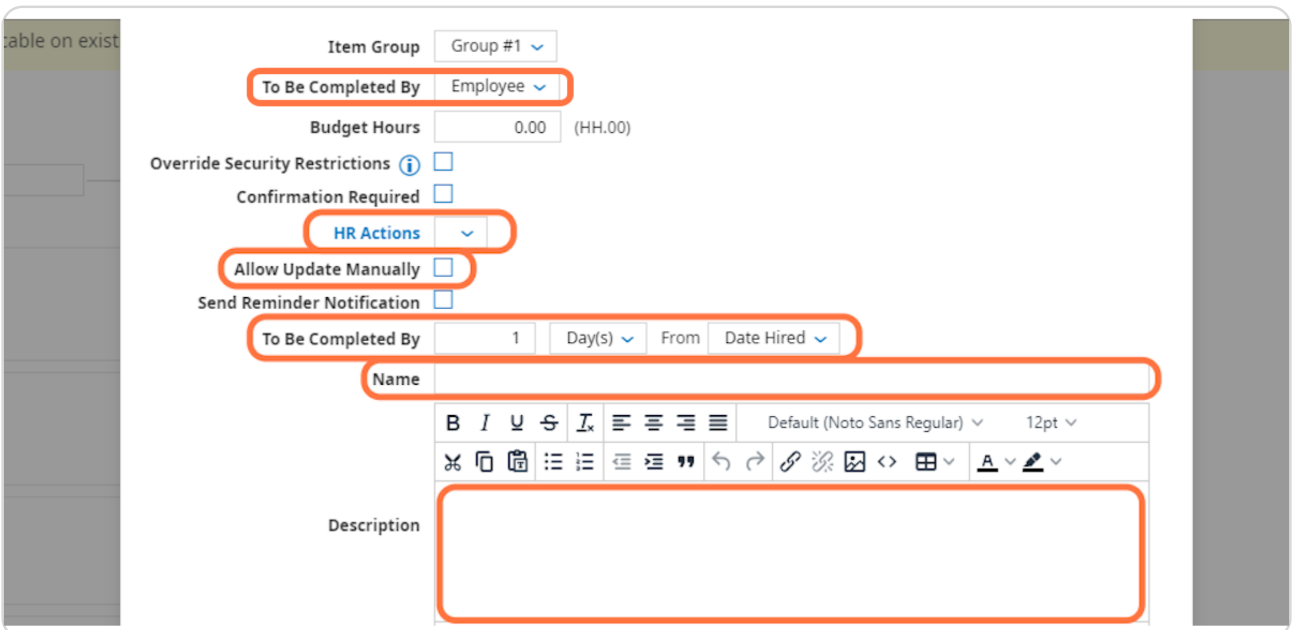
**The available check boxes and settings will vary based on what type of checklist item you're editing.*



STEP 15

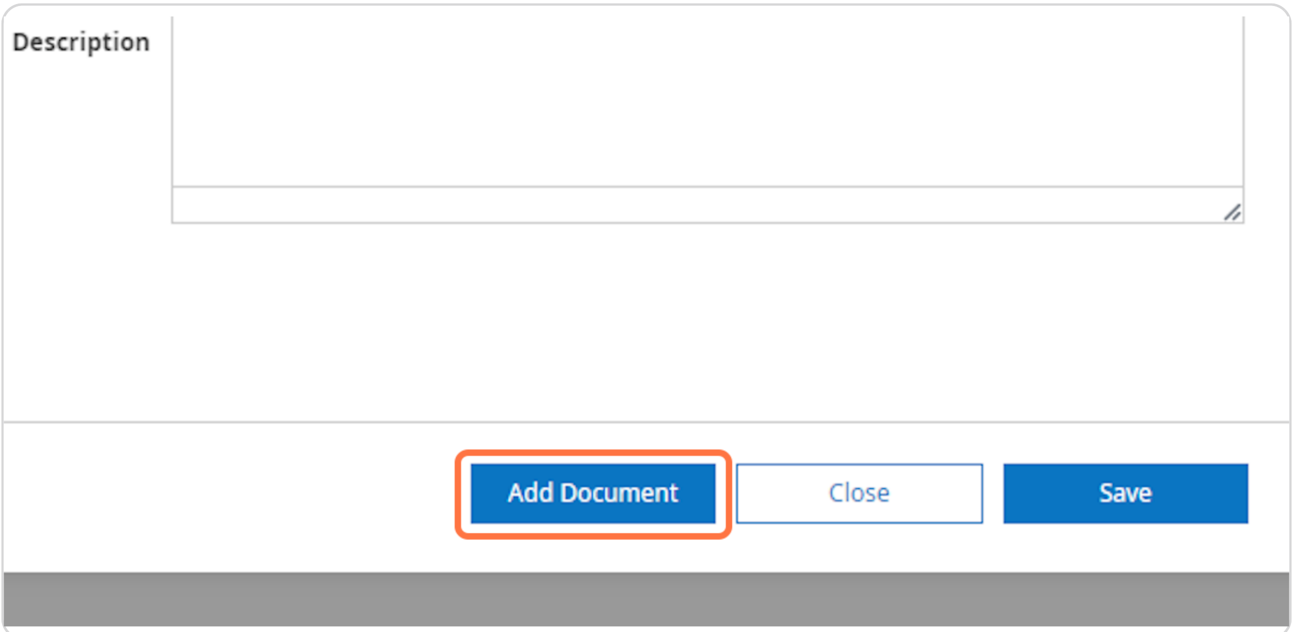
(The HR Action Step is being used here)

Key items to know:
To Be Completed By: If the item needs completed by the employee, make sure this is set to "Employee".
HR Actions: Select the HR Action to be used for this checklist step. (This will look nearly identical for the Government Forms and Custom Forms checklist steps - you will have a drop down available to choose the HR Action/Government Form/Custom Form to be used in this checklist item.)
Allow Update Manually: When checked, it will allow employees to mark the checklist item as complete without completing the information in the item.
To By Completed By: [X] Days/Weeks/Months/Years From Date Hired/Started/Checklist Assigned Date/Custom Date/Birthday/Review Date - select the period of time that you want the employee to complete this checklist item by. *Note: If the item is not complete by the date selected, it will simply have an 'overdue' status and will not disappear from the employee's checklist.
Name: This is the name of the checklist item as it will appear in the checklist configuration and for the employee.
Description: Enter details, instructions, notes, etc for the employee to view when completing the checklist item. (The more information, the better!)



STEP 16

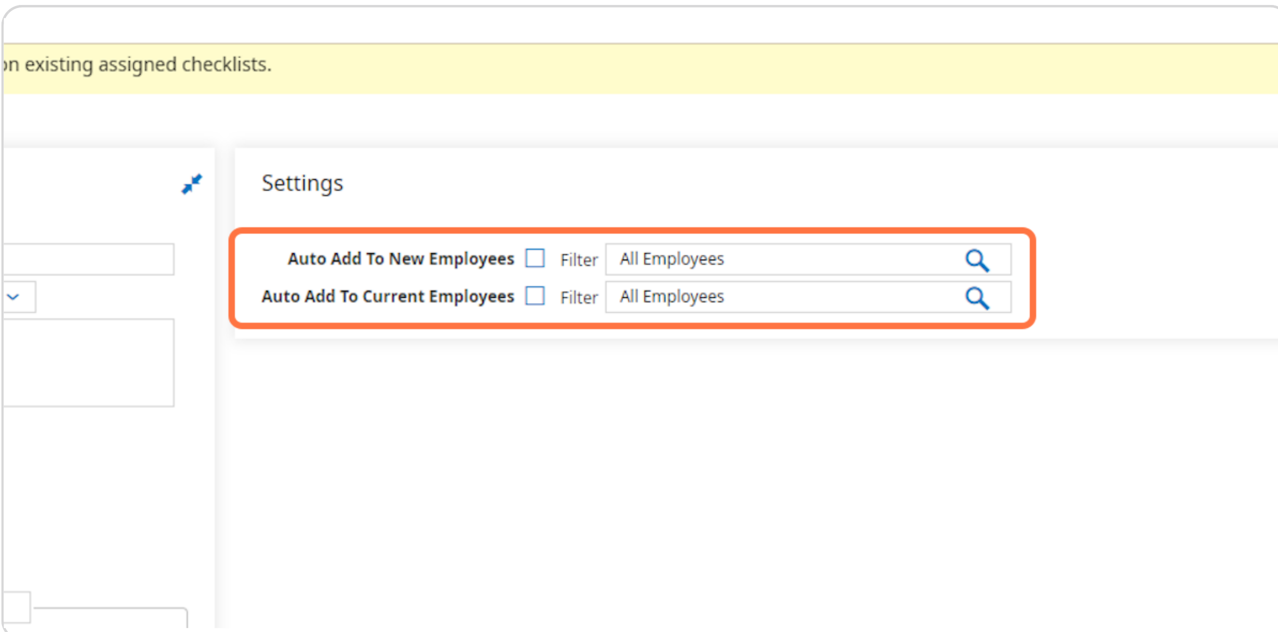
If the checklist item has the "Add Document" button available at the bottom of the window, you may upload a document for the employee to view along with the checklist item. (It is not required but is available, if needed.)



STEP 17

Additional Settings

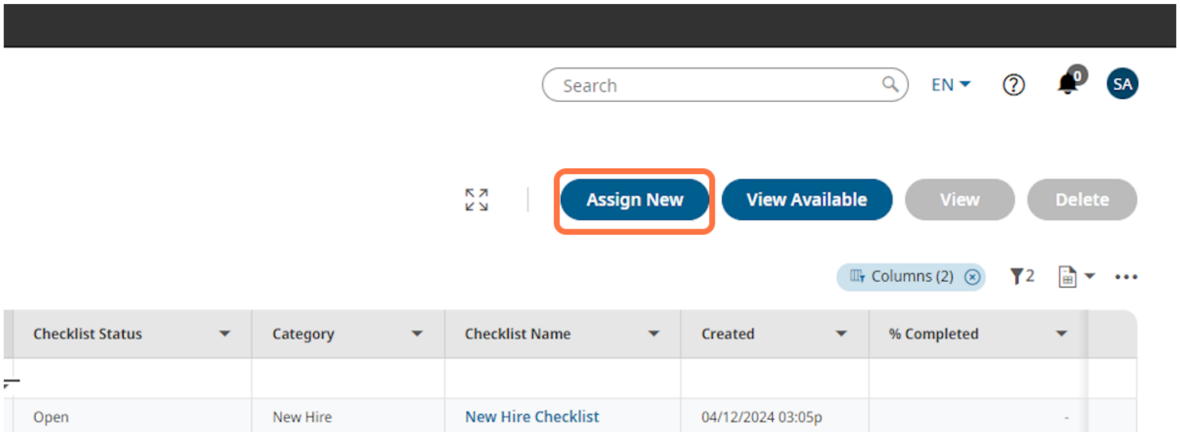
Auto Add To New Employees: When checked (and filter is set to 'all employees'), this checklist will automatically be assigned to all new employees as soon as their account is created within Elements. (Note: this does not apply to re-hired employees).
Auto Add To Current Employees: When checked (and filter is set to 'all employees'), this checklist will automatically be assigned to all employees within the company.
**Custom employee filters can be set within the filter box by selecting the magnifying glass icon. (For example, if you want to auto-assign this checklist to all full-time employees, you can set the filter to "Employee Type" = Full Time, then the checklist will be assigned to all full time employees when they're hired into the system.)*



STEP 18

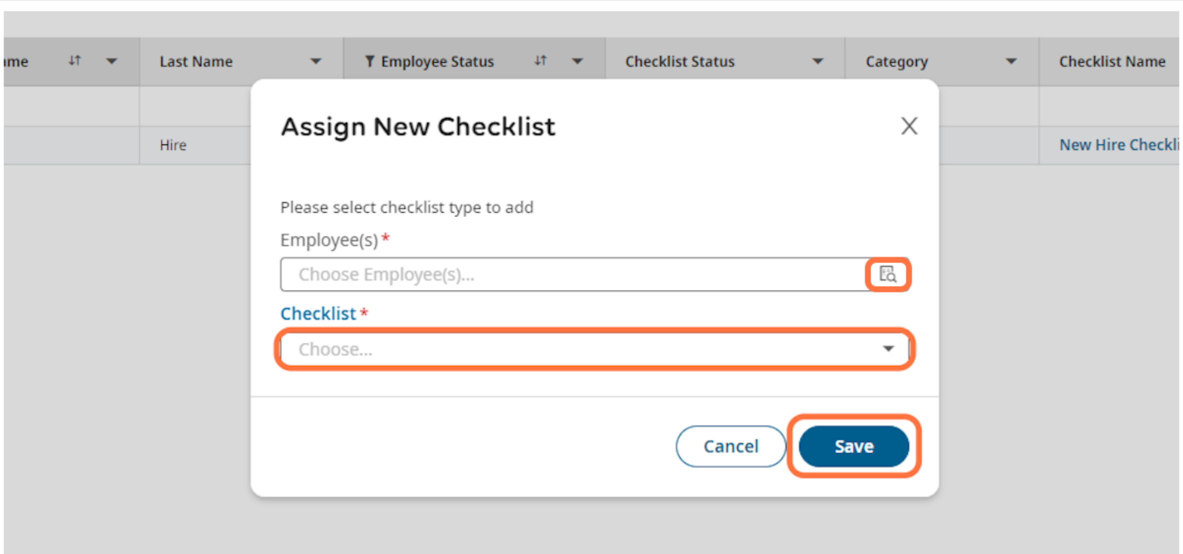
Manually Assigning A Checklist To An Employee

A checklist can manually be assigned to an employee, if needed, by going to the menu > team tab > HR > Checklists > Checklists, then select the "Assign New" button.



STEP 19

Select the employee(s) from the list, then select the checklist that you wish to assign to the employee(s). When done, save. Once saved, the employee(s) will see the checklist in their bell icon in Elements.



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