

Checklists

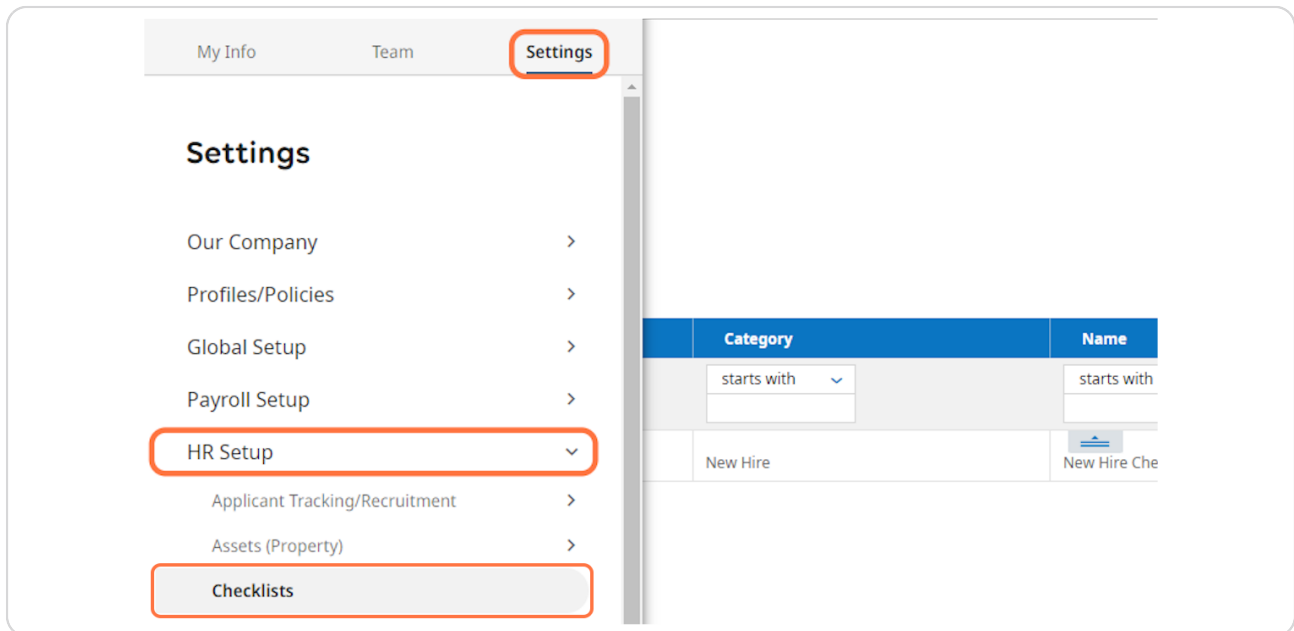
How to create a checklist within Elements

19 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
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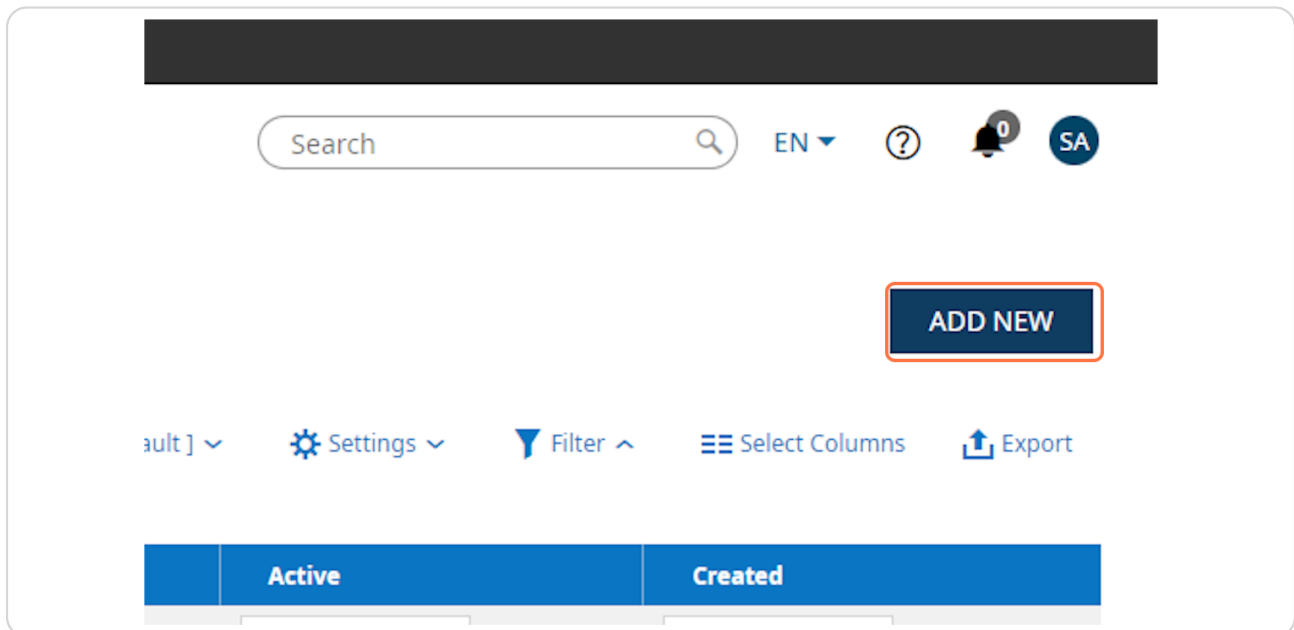
STEP 1

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



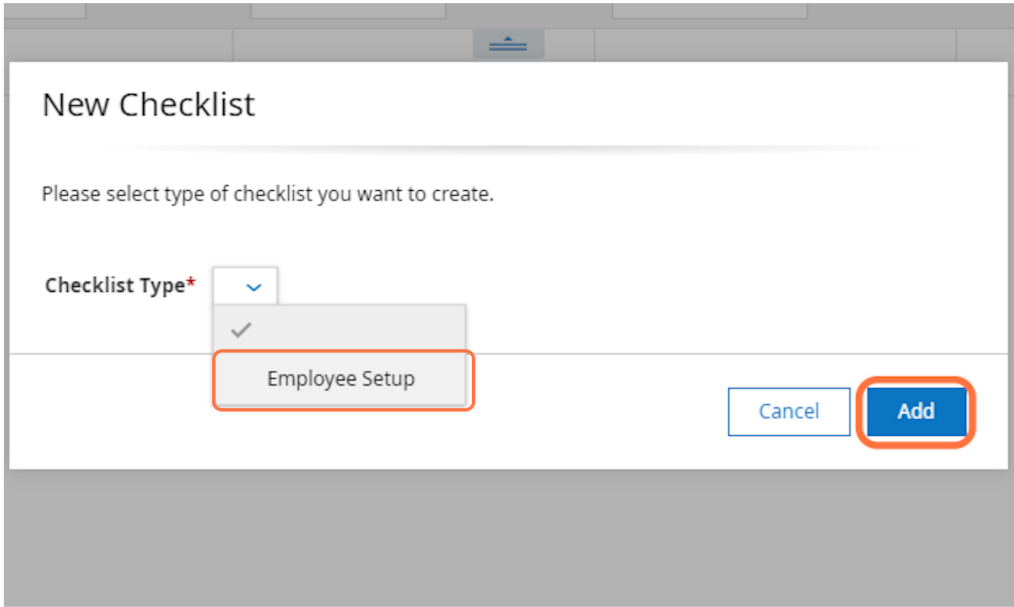
STEP 2

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.



New Checklist

Please select type of checklist you want to create.

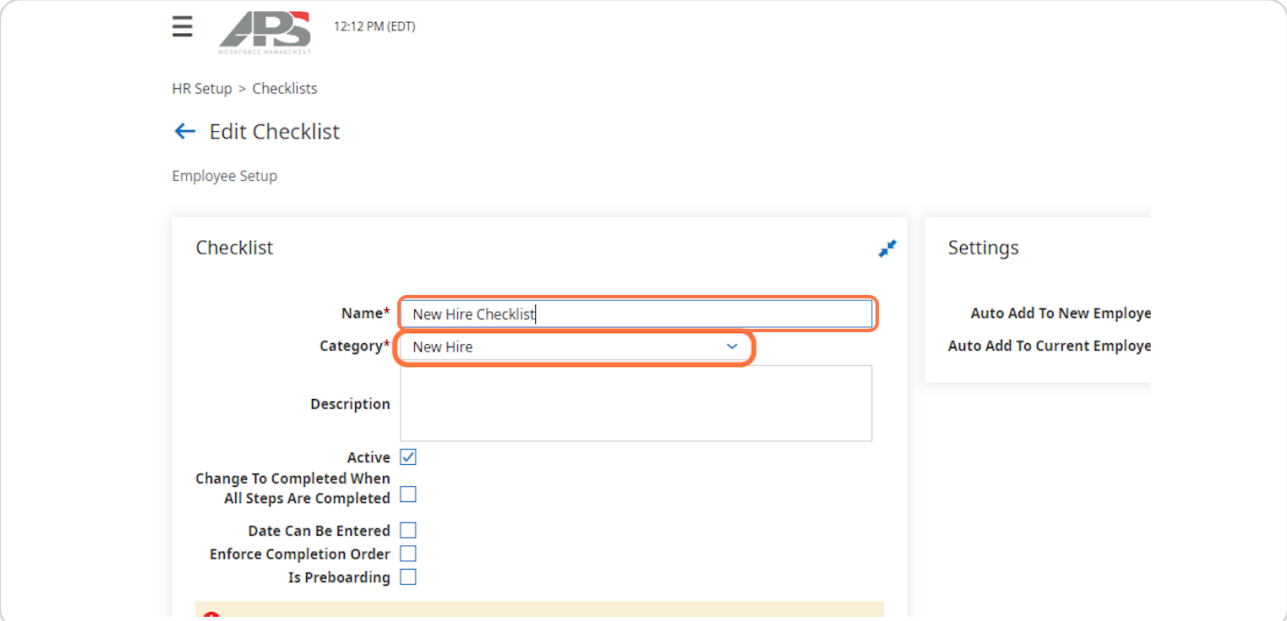
Checklist Type*

Employee Setup

Cancel 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.



12:12 PM (EDT)

HR Setup > Checklists

Edit Checklist

Employee Setup

Checklist

Name* New Hire Checklist

Category* New Hire

Description

Active

Change To Completed When All Steps Are Completed

Date Can Be Entered

Enforce Completion Order

Is Preboarding

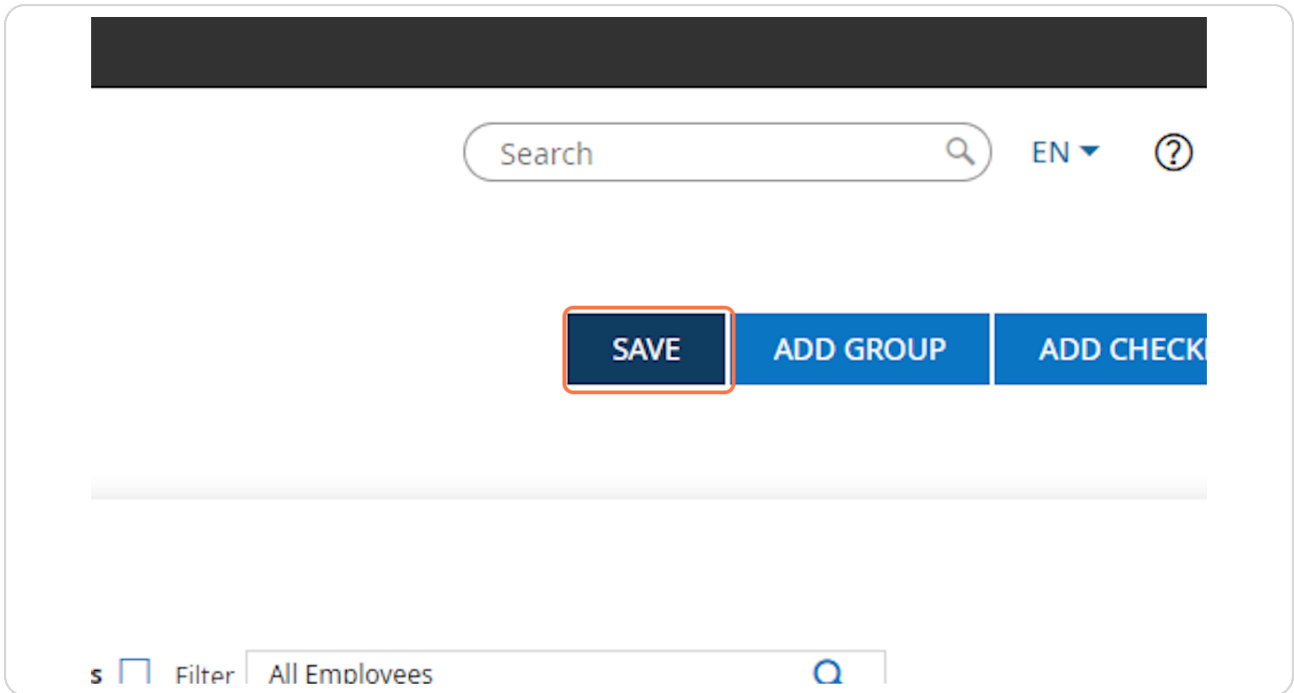
Settings

Auto Add To New Employee

Auto Add To Current Employee

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.)

The screenshot displays the 'Edit Checklist' interface. At the top left, there is a back arrow and the text 'Edit Checklist'. Below this, it says 'Employee Setup'. On the top right, there are two buttons: 'SAVE' and 'DOWNLOAD'. The main content is divided into two panels: 'Checklist' and 'Settings'.

The 'Checklist' panel contains the following fields and options:

- Name***: Text input field containing 'New Hire Checklist'.
- Category***: Dropdown menu with 'New Hire' selected.
- Description**: Empty text input field.
- Active**:
- Change To Completed When All Steps Are Completed**:
- Date Can Be Entered**:
- Enforce Completion Order**:
- Is Preboarding**:

At the bottom of the 'Checklist' panel, there is a yellow warning box with a red exclamation mark icon and the text 'No Groups Defined'.

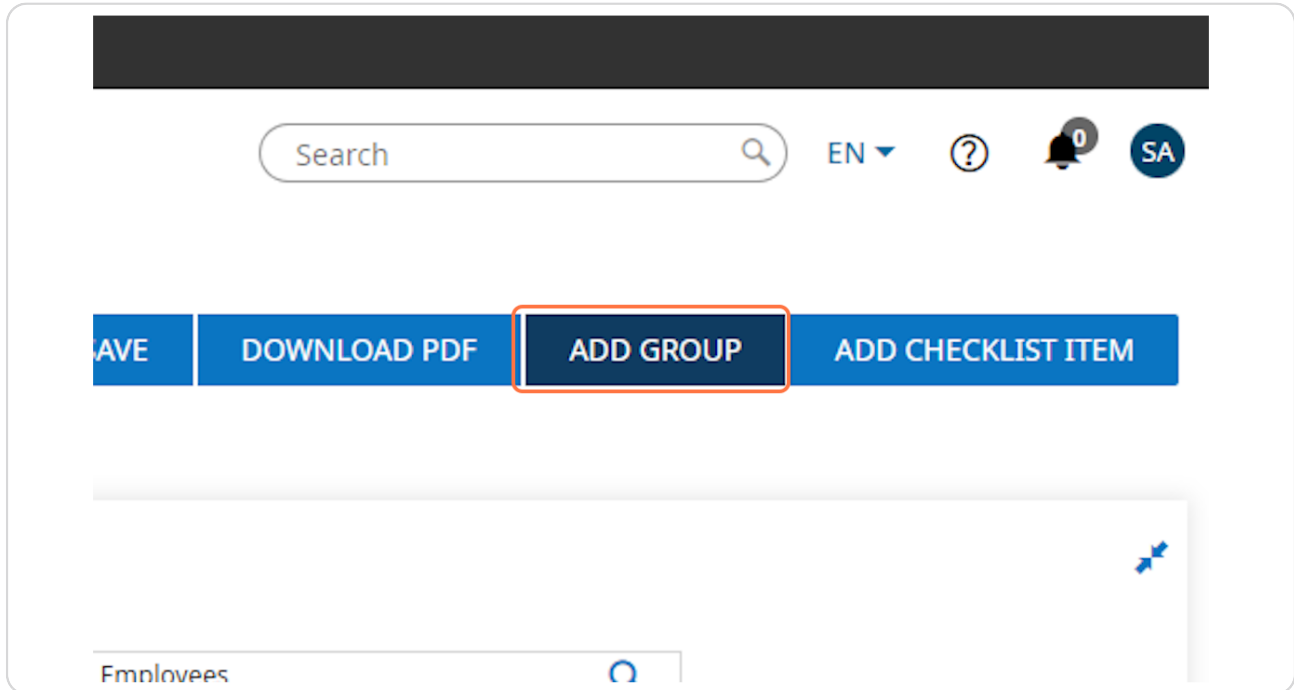
The 'Settings' panel contains the following options:

- Auto Add To New Employees**: Filter: All Employees
- Auto Add To Current Employees**: Filter: All Employees

STEP 7

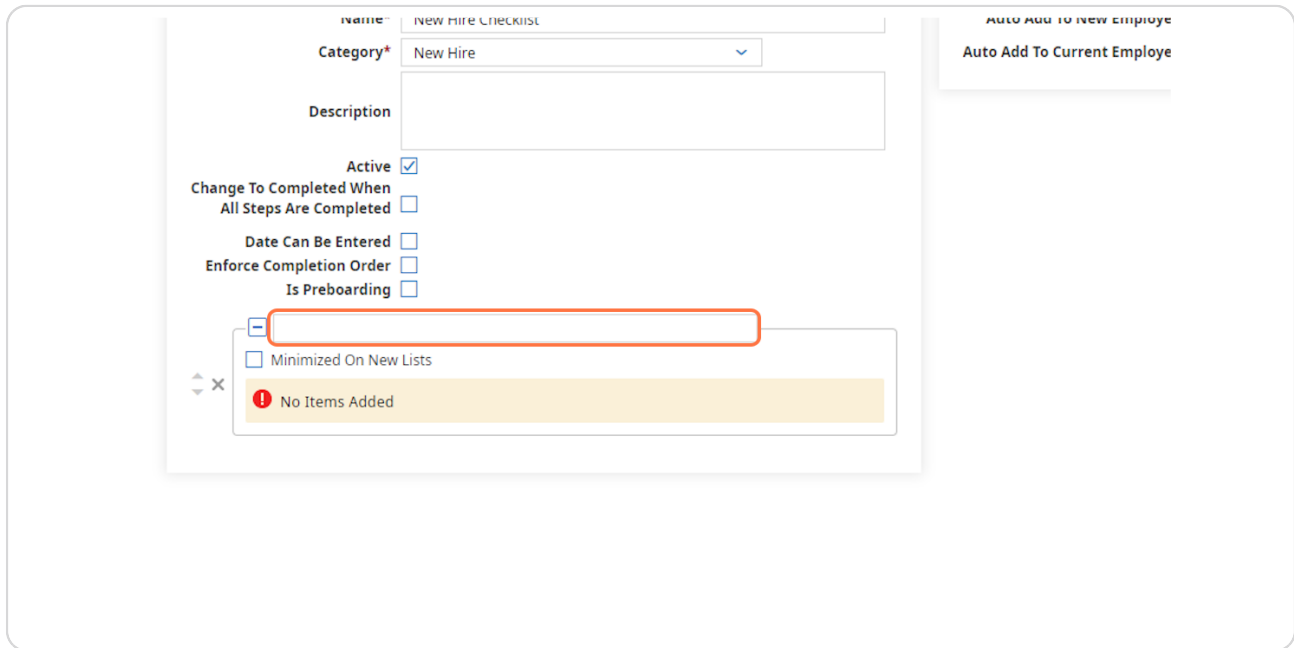
Select the **ADD GROUP** button to add a group title for tasks.

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

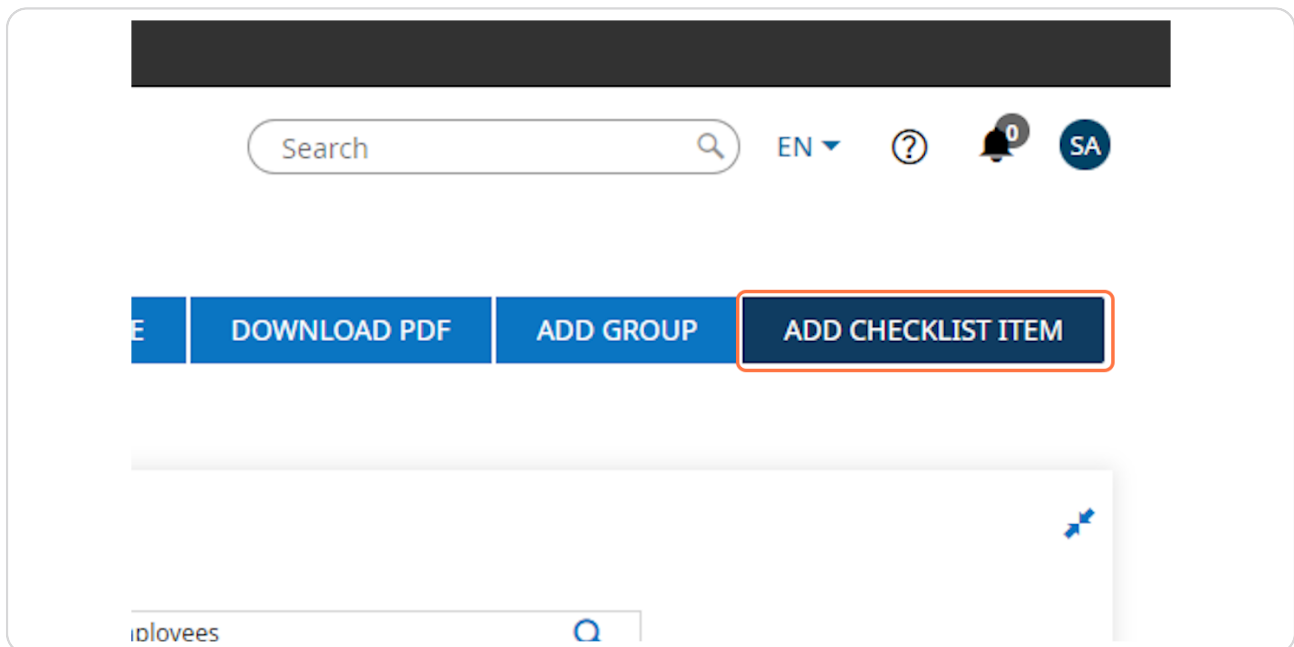
If you choose to add a group, it will appear as shown below. Enter the name of the group(s).



The screenshot shows a configuration form for a 'New Hire Checklist'. The 'Name' field is set to 'New Hire Checklist'. The 'Category' is set to 'New Hire'. The 'Description' field is empty. The 'Active' checkbox is checked. Other options include 'Change To Completed When All Steps Are Completed', 'Date Can Be Entered', 'Enforce Completion Order', and 'Is Preboarding', all of which are unchecked. A 'Minimized On New Lists' checkbox is also present and unchecked. A red box highlights an empty input field for adding a group. Below this field is a yellow warning banner that says 'No Items Added'. On the right side, there are two buttons: 'Auto Add To New Employee' and 'Auto Add To Current Employee'.

STEP 9

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



The screenshot shows the top navigation bar of the application. It includes a search bar, a language dropdown set to 'EN', a help icon, a notification bell with '0' items, and a user profile icon labeled 'SA'. Below the navigation bar is a menu with four buttons: 'E', 'DOWNLOAD PDF', 'ADD GROUP', and 'ADD CHECKLIST ITEM'. The 'ADD CHECKLIST ITEM' button is highlighted with a red box. At the bottom of the page, there is a search bar with the text 'employees' and a search icon.

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.

Search

SAVE DOWNLOAD PDF ADD GR

Add Item

GROUP TO ADD TO

New Group

Existing Group Group #1

Items 1

Rows On Page 100 16 Rows

	Name	Description
<input type="checkbox"/>	starts with	like
<input type="checkbox"/>	Content	
<input type="checkbox"/>	Custom Form	
<input type="checkbox"/>	Government Form	

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).*

Items 1

Rows On Page 10 1-10 Of 16 Page 1 Of 2

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Content	
<input type="checkbox"/>	Custom Form	
<input type="checkbox"/>	Government Form	
<input type="checkbox"/>	HR Action	
<input type="checkbox"/>	Hyperlink to page outside system	
<input type="checkbox"/>	Hyperlink within System	
<input type="checkbox"/>	Learning	
<input type="checkbox"/>	Screen Link	Benefit Enrollment
<input type="checkbox"/>	Screen Link	My Direct Deposit
<input type="checkbox"/>	Screen Link	My Form CA 2810.5

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)

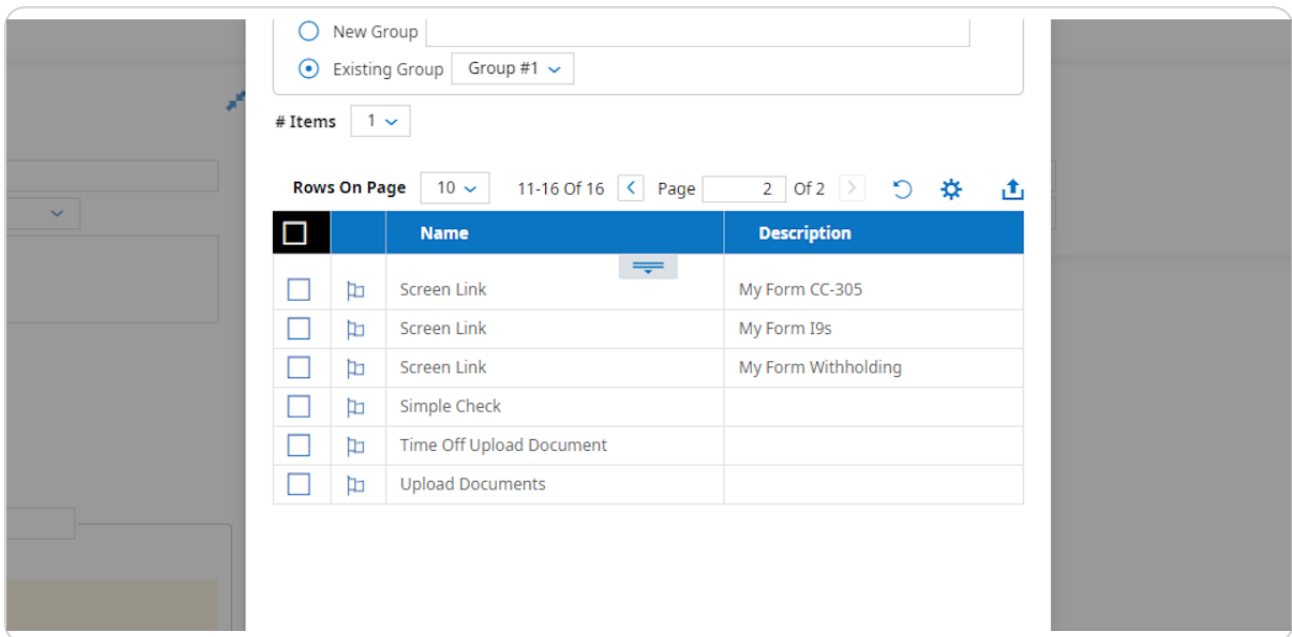
Screen Link (My Form I9s): Provides a direct link to Form I-9

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.



The screenshot displays a web interface for managing checklist items. At the top, there are radio buttons for "New Group" and "Existing Group" (selected), with a dropdown menu showing "Group #1". Below this is a "# Items" dropdown set to "1". A pagination bar shows "Rows On Page" set to "10", "11-16 Of 16", "Page 2 Of 2", and icons for refresh, settings, and share. The main content is a table with the following data:

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Screen Link	My Form CC-305
<input type="checkbox"/>	Screen Link	My Form I9s
<input type="checkbox"/>	Screen Link	My Form Withholding
<input type="checkbox"/>	Simple Check	
<input type="checkbox"/>	Time Off Upload Document	
<input type="checkbox"/>	Upload Documents	

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".

The screenshot displays a software interface with a table of checklist items. The table has two columns: 'Name' and 'Description'. At the top of the table, there are two dropdown menus: 'starts with' and 'like'. Below the table, there are two buttons: 'Close' and 'Add Selected'. The 'Add Selected' button is highlighted with a red border.

	Name	Description
<input type="checkbox"/>	Content	
<input type="checkbox"/>	Custom Form	
<input type="checkbox"/>	Government Form	
<input checked="" type="checkbox"/>	HR Action	
<input type="checkbox"/>	Hyperlink to page outside system	
<input type="checkbox"/>	Hyperlink within System	
<input type="checkbox"/>	Learning	
<input checked="" type="checkbox"/>	Screen Link	Benefit Enrollment
<input checked="" type="checkbox"/>	Screen Link	My Direct Deposit

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.*

The screenshot displays a configuration panel for a checklist item. At the top, there are three settings, each with an unchecked checkbox: "Date Can Be Entered", "Enforce Completion Order", and "Is Preboarding". Below these is a section with a minus icon in a box and a text input field. Underneath that is a checkbox labeled "Minimized On New Lists", which is also unchecked. The main configuration area contains two items. The first item is "Not Configured" in red text, with a pencil icon in a red box to its left. Below it, the text "To Be Completed By: Anyone" is visible. The second item is "Benefit Enrollment" in bold black text, with a pencil icon to its left. Below it, the text "To Be Completed By: Anyone" is visible. On the left side of the configuration area, there are vertical double-headed arrows and a close 'x' icon.

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!)

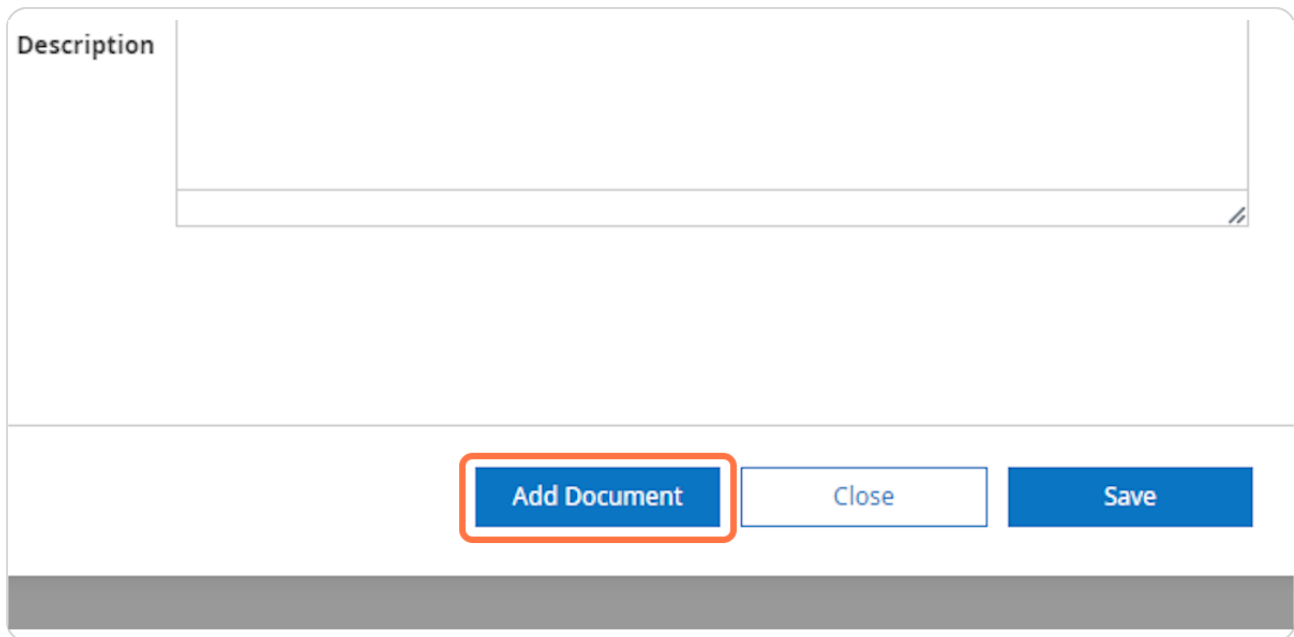
The screenshot shows a configuration form for a checklist item. Several fields are highlighted with orange boxes:

- To Be Completed By:** Set to "Employee".
- Budget Hours:** Set to 0.00 (HH.00).
- HR Actions:** A dropdown menu.
- Allow Update Manually:** An unchecked checkbox.
- To Be Completed By:** Set to 1 Day(s) From Date Hired.
- Name:** A text input field.
- Description:** A rich text editor area.

The form also includes other fields like "Item Group" (Group #1), "Override Security Restrictions" (unchecked), "Confirmation Required" (unchecked), and "Send Reminder Notification" (unchecked). A rich text editor toolbar is visible above the description field.

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.)



The screenshot shows a form window with a "Description" label on the left and a large text input area on the right. At the bottom of the form, there are three buttons: "Add Document" (highlighted with an orange border), "Close", and "Save". The "Add Document" button is blue with white text, while "Close" is white with blue text and "Save" is solid blue with white text.

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.)*

on existing assigned checklists.

Settings

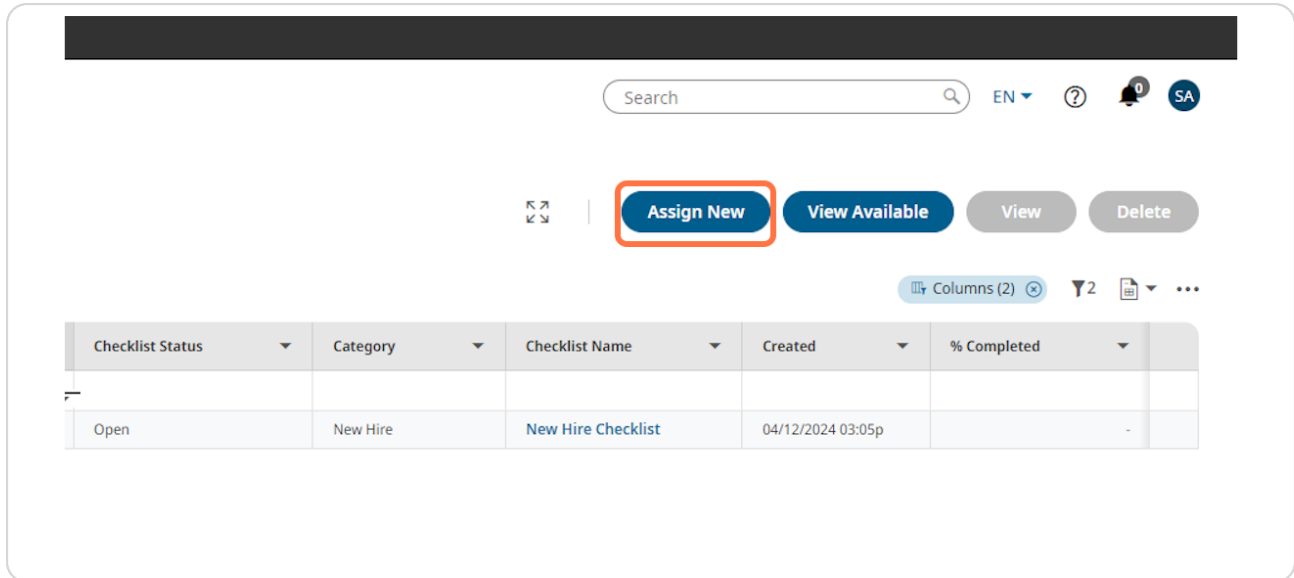
Auto Add To New Employees Filter All Employees

Auto Add To Current Employees Filter All Employees

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.

