



# Onboarding Series

Session II: Onboarding Checklists

May 2, 2024

# Overview

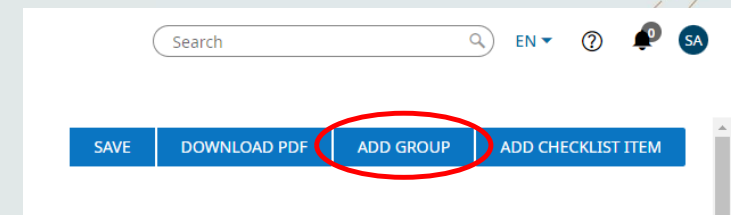
- + Configuring checklists
- + Checklists from the employee's view
  - New feature spotlight: Shadow session/login as employee
- + Troubleshooting checklists & checklist reporting
- + Questions

# Checklist Configuration

- + Multiple uses for checklists...
  - Onboarding
  - Termination
  - Policy updates (time off policies, handbooks, cell phone policies, annual holidays, etc.)
- + Electronic checklists in Elements replace the need for hard copies of checklists and documents that you may collect from employees
- + Everything is easily accessible and electronically stored so you and your team can access it from anywhere

# Checklist Configuration (continued)

- + Menu > Settings Tab > HR Setup > Checklists
- + To create a new checklist, select the "ADD NEW" button
  - Select the Checklist Type, then Add
  - Enter a name for the checklist
  - Category: choose from an existing category or simply type a new category
  - *Change To Completed When All Steps Are Completed*: check this box to have the checklists' status change to "completed" when all steps in the checklist are complete
  - *Enforce Completion Order*: Forces employees to complete steps in the order that they are shown in the checklist
  - *Auto Add To New Employees*: Will automatically assign the checklist to all new employees (or a custom employee filter) upon hire (would normally be checked for an onboarding checklist)
  - *Auto Add To Current Employees*: Will automatically assign the checklist to all existing employees, active and terminated (or a custom employee filter for existing employees) (could be used for a policy update, training material assignment, etc. Checklists can also be mass-assigned to specific employees if you do not wish to check this box)
- + To add items to the checklist, select the "ADD CHECKLIST ITEM" button.
- + The "ADD GROUP" button can be used to create various task groups... 'employee tasks', 'HR tasks', 'manager tasks', for example.



# Available Checklist Items

## Items

- + Content
- + Custom Form
- + Government Form
- + HR Action
- + Hyperlink/Screen Link
- + Simple Check
- + Time Off Upload Document
- + Upload Documents

## Use

- + Special content, such as text, images, videos, tables, links, etc.
- + Allows you to insert one of the company's custom forms.
- + Allows you to insert a specific government form for the employee to complete.
- + Allows you to insert a specific HR Action for the employee to initiate and complete.
- + Allows you to insert external web links and internal system links
- + Provides a flexible step for admins to use as a "double check".
- + Allows users to upload specific time-off-related documents.
- + A step specifically designed to allow employees to upload documents to the checklist.

# Checklist Items (continued)

## Task

- + Address, emergency contacts, birthday, etc.
- + Direct deposit
- + I-9
- + Form W-4
- + State Withholding Form\*
- + Benefit Enrollment
- + Company Document (with signature)
- + Company Document (without signature)
- + Welcome Video

## Checklist Item to Use

- + HR Action – this will be a 'personal information' HR action
- + HR Action – this will be a 'direct deposit' HR action
- + Screen Link to My Form I9s
- + Government Form – select "Federal Withholding"
- + Screen Link to My Form Withholding\*
- + Screen Link to Benefit Enrollment
- + Custom Form
- + Upload Documents
- + Content

# Login As Employee/Shadow Session Feature

- + Select the "Login As Employee" button from the Employee Information Page OR Employee Quick Links & Actions > Login As Employee
- + Clients have found this especially helpful when assisting employees with various parts of their ESS (checklists, accessing pay stubs or W2s, etc)
- + *If you'd like this feature enabled, please contact APS and ask us to enable the shadow session feature. Please provide all users that you want to have access to this feature.*

My Team > Employee Information

← Employee Information

Page 1 of 1 | 1 - 8 of 8 Rows | Current: [System]

	Employee Id	Badge	Username	First Name	Last Name
<input type="checkbox"/>	=	=	=	starts with	starts with
<input type="checkbox"/>	4		TEmployee	Test	Employee
<input type="checkbox"/>	6	100	TAdmin	Test	Admin
<input type="checkbox"/>	5		TManager	Test	
<input type="checkbox"/>	7		ATEST	ACA	
<input type="checkbox"/>	8		ATEST2	ACA	
<input type="checkbox"/>	9		ATEST3	ACA	
<input type="checkbox"/>	10		ATEST4	ACA	
<input type="checkbox"/>	13		NHire	New	

Employee Quick Links and Actions

TE Test T. Employee  
Employee ID: 4

Links

- Account Audit Trail
- Availability/Preferences
- Current Timesheet
- Pay Statement History
- View ACA History
- View Total Compensation Statement
- All Timesheets
- Create Open Absence
- Edit Schedule
- Pay Statement Records History
- View Organization Chart

Actions

- Login As Employee
- Request Time Off

Close

# Reports for Troubleshooting

## + Checklists Report

- HR > Checklist > Checklists
- Summary view of the active checklists
- Can view the employee, the checklists that are assigned, when it was assigned (Created), and how complete the checklist is
- Option to assign new and to view the available checklists in the top right

HR > Checklists > Checklists

← Checklists



Assign New

View Available

View

Delete

Page 1 of 1 1 - 16 of 16 Rows Current: [System]

Columns (1) 1

				Employee Id	First Name	Last Name	Employee Status	Checklist Status	Category	Checklist Name	Created	% Completed	
				=	starts with	starts with	!= Terminated	=	=	=	=	=	
<input type="checkbox"/>				4	Test	Employee	Active	Open	New Hire	New Hire Checklist (for webinar)	04/22/2024 10:04a	-	
<input type="checkbox"/>				4	Test	Employee	Active	Open	New Hire	New Hire Checklist*	04/23/2024 07:01p	-	
<input type="checkbox"/>				5	Test	Manager	Active	Open	New Hire	New Hire Checklist*	04/23/2024 11:25a	-	
<input type="checkbox"/>				5	Test	Manager	Active	Open	New Hire	New Hire Checklist*	04/23/2024 07:01p	-	
<input type="checkbox"/>				6	Test	Admin	Active	Open	New Hire	New Hire Checklist	08/01/2023 09:37a	-	
<input type="checkbox"/>				6	Test	Admin	Active	Open	New Hire	New Hire Checklist*	04/23/2024 07:01p	-	
<input type="checkbox"/>				7	ACA	TEST	Not In Payroll	Open	New Hire	New Hire Checklist	12/06/2023 08:28a	-	



# Reports for Troubleshooting

## + Checklist Items

- HR > Checklist Items
- Detailed view of checklists
- Shows checklist items individually, progress on checklist items, completion dates

HR > Checklists > Checklist Items

## ← Checklist Items

Page 1 of 10 | 1 - 20 of 192 Rows | Current: [ System ]

			Employee Id	First Name	Last Name	Checklist Name	Group Name	Item Name	Should Be Completed By	Is Completed	Completed On
			4	Test	Employee	New Hire Checklist (for webinar)	Employee Tasks	Enter Personal Information	Test T. Employee		
			4	Test	Employee	New Hire Checklist (for webinar)	Employee Tasks	My Form I-9	Test T. Employee		
			4	Test	Employee	New Hire Checklist (for webinar)	Employee Tasks	Federal Withholding Form W-4	Test T. Employee		
			4	Test	Employee	New Hire Checklist (for webinar)	Employee Tasks	State Withholding Form	Test T. Employee		
			4	Test	Employee	New Hire Checklist (for webinar)	Employee Tasks	Enter Direct Deposit Information	Test T. Employee		
			4	Test	Employee	New Hire Checklist (for webinar)	Employee Tasks	My Benefit Enrollment	Test T. Employee		
			4	Test	Employee	New Hire Checklist (for webinar)	Employee Tasks	Train to Thrive Webinar	Test T. Employee		

# Reports for Troubleshooting

## + All HR Action Requests

### ○ My Reports > HR Reports > Employee Maintenance > All HR Action Requests

- Specific to HR Action Checklist Items. Typically, these are items that require review or approval before being applied to an employee's account (ex. Direct deposit changes or Personal Information)
- If there is a workflow assigned to the HR Action, the Button: View Workflow column can be used
- Check the request state of the item (approved/rejected/new) and view who updated the status of the item

My Reports > HR Reports > Employee Maintenance > All HR Action Requests

## ← All HR Action Requests

Page 1 of 1 | 1 - 4 of 4 Rows | Current: Default

					Employee First Name	Employee Last Name	Employee Id	Applicant First Name	Applicant Last Name	Initiator First Name	Initiator Last Name	Initiator Employee Id
					Test	Admin	6			Test	Admin	6
					Test	Employee	4			Test	Employee	4
					Test	Employee	4			Test	Employee	4
					Test	Employee	4			Test	Employee	4

# Reports for Troubleshooting

## + All To Do Items

### ○ My Reports > System Utilities > All To Do Items

- View all pending To Do Items
- If there is an item that is pending approval/rejection, it can be taken care of here. The workflow can be viewed as well to see who has the item and what the next steps are.

My Reports > System Reports > System Utilities > All To Do Items

← All To Do Items

MASS APPROVE MASS REJECT DELETE TO DO ITEMS

Rows On Page 20 Showing: 1-20 Of 72 Page 1 Of 4 Refresh Data

Full Screen [Default] Settings Filter Select Columns Export

Show Lost To Do Items: None

<input type="checkbox"/>		Username	To Do Type	Description	Created
<input type="checkbox"/>	X	NHire	Checklist Item	<b>New Hire Checklist (New Hire)</b> <ul style="list-style-type: none"><li>New Hire</li></ul> <b>Benefit Enrollment</b> <p>Please complete the form according to the benefits that you wish to enroll in or waive. If you fail to complete this document in your first 30 days, you will automatically waive all coverage options and will not be able to enroll again until open enrollment in December, which enrolls in/waives coverage for the following calendar year.</p>	04/12/2024 03:05p
<input type="checkbox"/>	X	TEmployee	Workflow: Timesheet	<b>Manager</b> <p>Employee: <a href="#">Test T. Employee (4)</a> Pay Period: Bi-Weekly Date: 03/30/2024 - 04/12/2024</p> <p><b>REJECT</b> <b>APPROVE</b></p>	04/16/2024 04:27p
<input type="checkbox"/>	X	TEmployee	Form W4	<b>Submit Form W4</b> <ul style="list-style-type: none"><li>Test T. Employee</li></ul>	04/22/2024 10:03a
<input type="checkbox"/>	X	TEmployee	Form W4	<b>Submit Form W4</b> <ul style="list-style-type: none"><li>Test T. Employee</li></ul>	04/22/2024 10:04a
<input type="checkbox"/>				<b>New Hire Checklist (for webinar) (New Hire)</b> <ul style="list-style-type: none"><li>Test T. Employee</li></ul>	



# Reports for Troubleshooting

## + My To Do Items

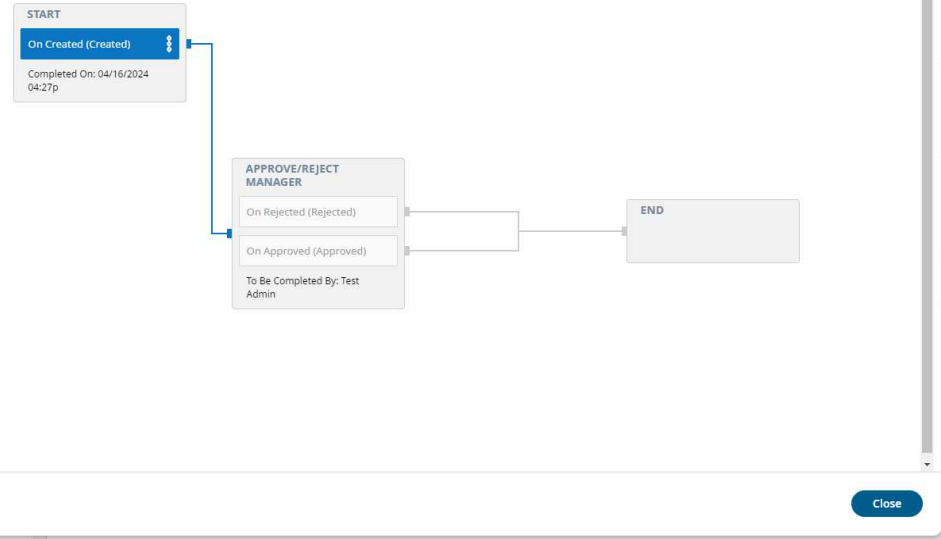
← My To Do Items Reject Approve

Page 1 of 1 1 - 1 of 1 Rows

Select all (0/0) Saved: [ System ]

<input type="checkbox"/>	 Approve/Reject Timesheet Test T. Employee Mar 30, 2024 - Apr 12, 2024 Created 04/16/2024 04:27 pm	<b>Approve/Reject Timesheet</b> Mar 30, 2024 - Apr 12, 2024  Test T. Employee (4)
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### Workflow



[Open Timesheet](#) [View Workflow](#)

Test Admin

04/16/2024 04:27 pm	Pay Period	Bi-Weekly	Date	Mar 30, 2024 - Apr 12, 2024
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# Manually Assigning Checklists

+ My Team > Employee Information > Employee Profile

- Go to the HR tab on the employee's profile
- Find the Checklists widget
- Click the +Add button on the far right

My Team > Employee Information

← Employee Profile

Utilities | Download PDF | Save

Single-Column View

Search Widget Names

TE Test T. Employee  
Employee ID: 4 | Hired Date: 28 Jan, 2024 (2 Months, 27 Days)

Main | Payroll | HR | Schedules | ACA | Edit Tabs

Jump To | Collapse All

Checklists

All Goals

Benefit Profile Enrollment Override

Employee Status Change

Checklists

Open | All

Page 1 of 1 | 1 - 1 of 1 Rows | All Categories

Checklist	Category	Status	Documents	Actions
New Hire Checklist (for webinar)	New Hire	Open		...

+ Add