Onboarding Series

Session II: Onboarding Checklists

May 2, 2024

Overview

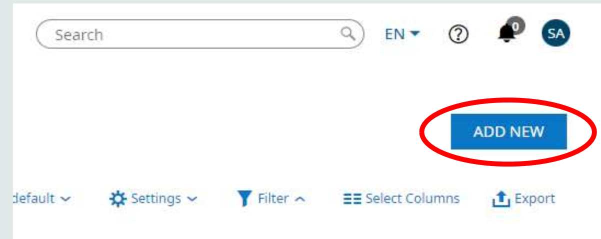
- Configuring checklists
- Checklists from the employee's view
  - New feature spotlight: Shadow session/login as employee
- Troubleshooting checklists & checklist reporting
- Questions

Checklist Configuration

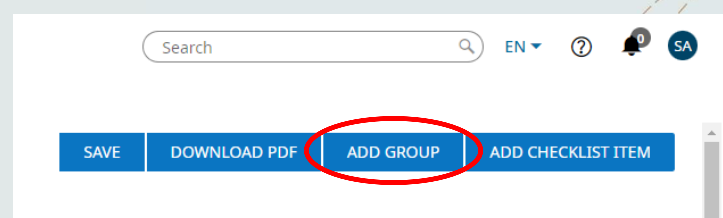
+ Multiple uses for checklists…
  - Onboarding
  - Termination
  - Policy updates (time off policies, handbooks, cell phone policies, annual holidays, etc.)
+ Electronic checklists in Elements replace the need for hard copies of checklists and documents that you may collect from employees
+ Everything 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

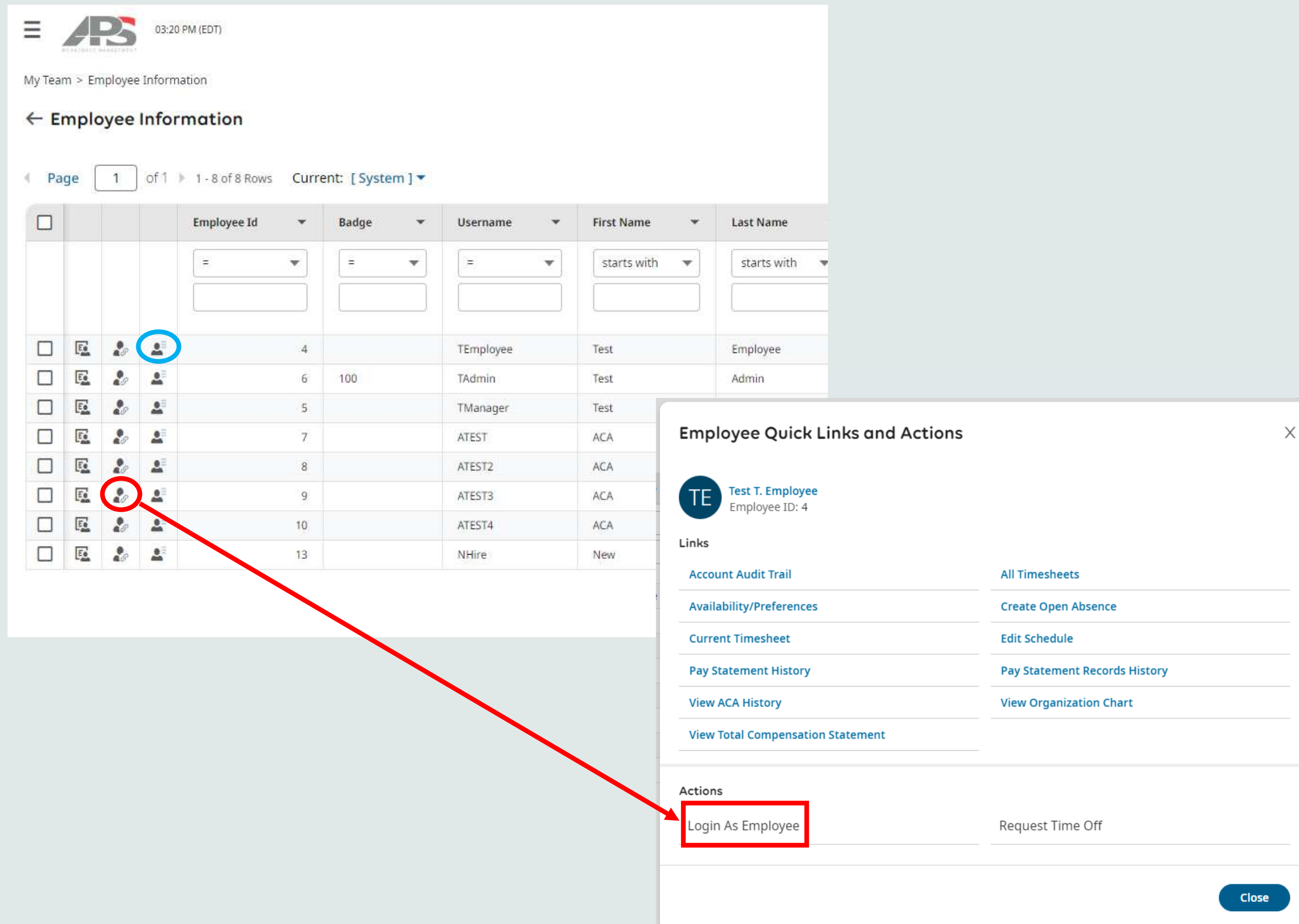
Items	Use
Content	Special content, such as text, images, videos, tables, links, etc.
Custom Form	Allows you to insert one of the company's custom forms.
Government Form	Allows you to insert a specific government form for the employee to complete.
HR Action	Allows you to insert a specific HR Action for the employee to initiate and complete.
Hyperlink/Screen Link	Allows you to insert external web links and internal system links
Simple Check	Provides a flexible step for admins to use as a "double check".
Time Off Upload Document	Allows users to upload specific time-off-related documents.
Upload Documents	A step specifically designed to allow employees to upload documents to the checklist.

Checklist Items (continued)

Task	Checklist Item to Use
Address, emergency contacts, birthday, etc.	HR Action – this will be a 'personal information' HR action
Direct deposit	HR Action – this will be a 'direct deposit' HR action
I-9	Screen Link to My Form I9s
Form W-4	Government Form – select "Federal Withholding"
State Withholding Form*	Screen Link to My Form Withholding*
Benefit Enrollment	Screen Link to Benefit Enrollment
Company Document (with signature)	Custom Form
Company Document (without signature)	Upload Documents
Welcome Video	Content

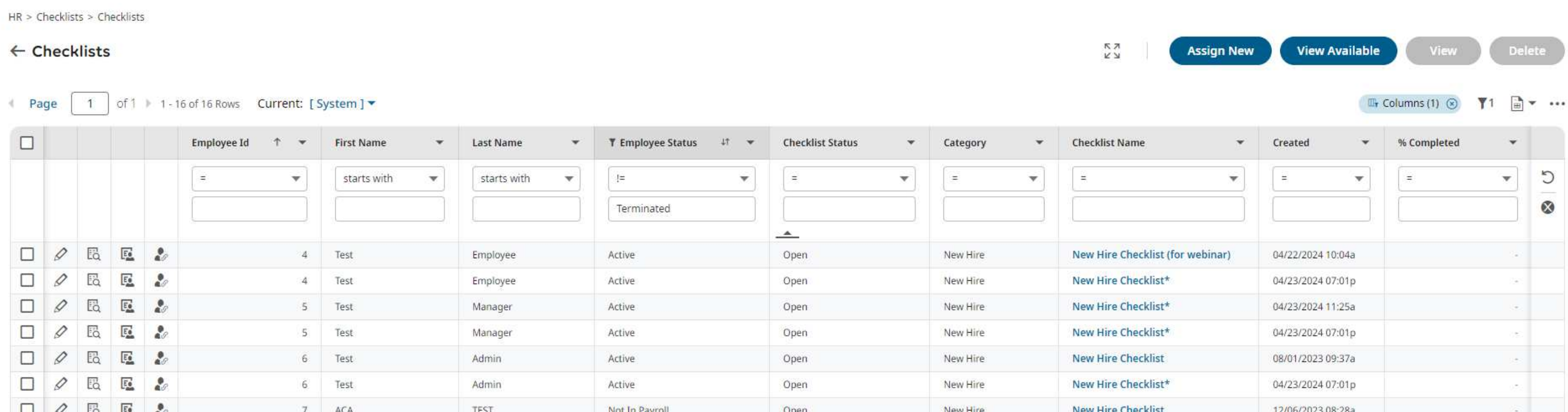
Login As Employee/Shadow Session Feature

- 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.*



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



Employee Id	First Name	Last Name	Employee Status	Checklist Status	Category	Checklist Name	Created	% Completed
=	starts with	starts with	!= Terminated	=	=	=	=	=
4	Test	Employee	Active	Open	New Hire	New Hire Checklist (for webinar)	04/22/2024 10:04a	-
4	Test	Employee	Active	Open	New Hire	New Hire Checklist*	04/23/2024 07:01p	-
5	Test	Manager	Active	Open	New Hire	New Hire Checklist*	04/23/2024 11:25a	-
5	Test	Manager	Active	Open	New Hire	New Hire Checklist*	04/23/2024 07:01p	-
6	Test	Admin	Active	Open	New Hire	New Hire Checklist	08/01/2023 09:37a	-
6	Test	Admin	Active	Open	New Hire	New Hire Checklist*	04/23/2024 07:01p	-
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

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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

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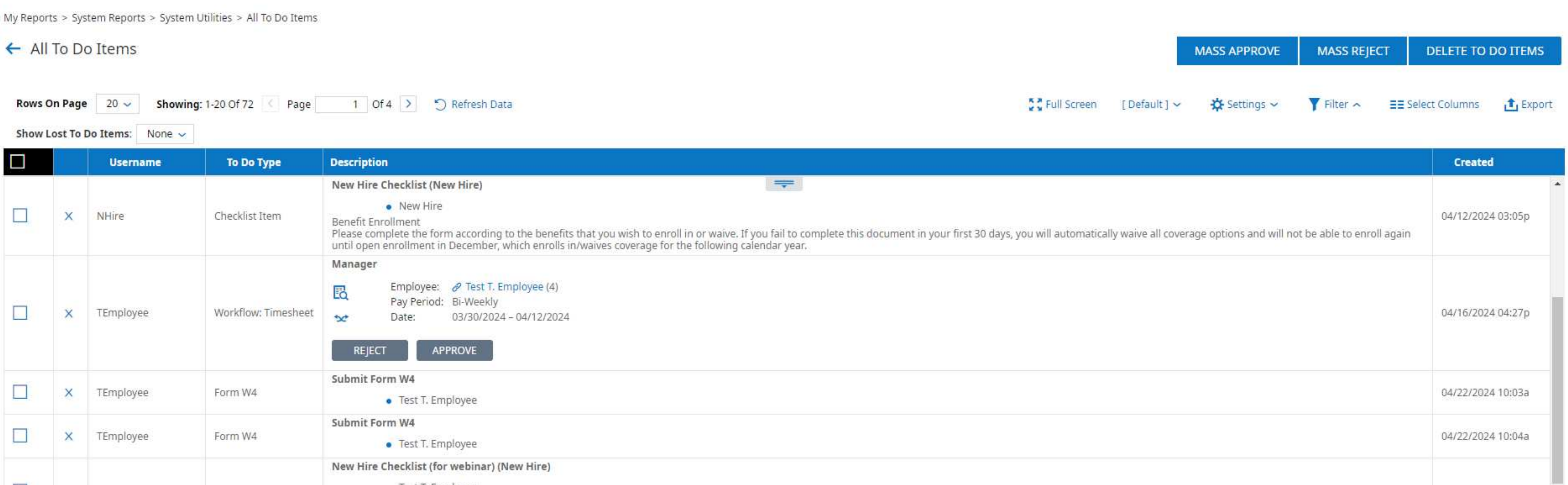
					Employee First Name	Employee Last Name	Employee Id		Applicant First Name	Applicant Last Name	Initiator First Name	Initiator Last Name	Initiator Employee Id
					Test	Admin	6				Test	Admin	6
					Test	Employee	4				Test	Employee	4
					Test	Employee	4				Test	Employee	4
					Test	Employee	4				Test	Employee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

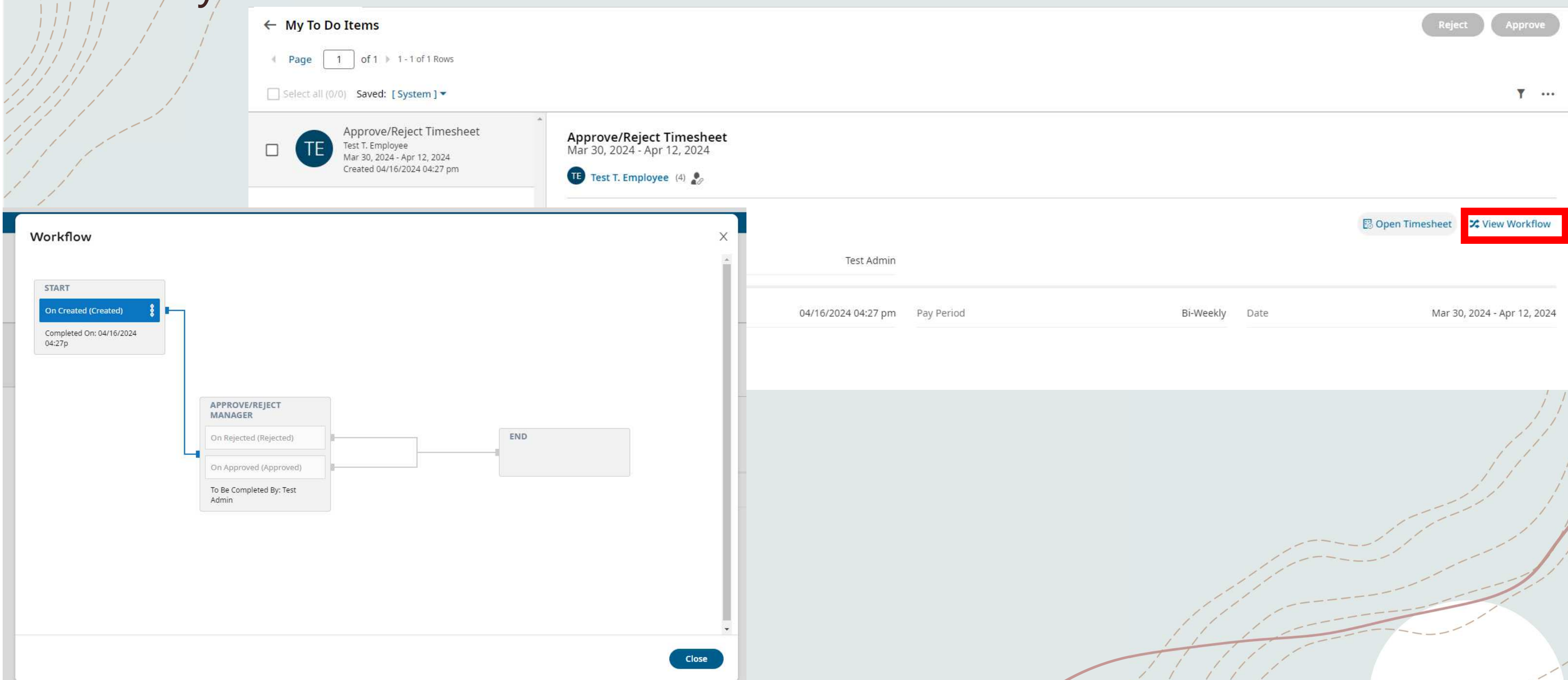
Reports for Troubleshooting

- 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.



Reports for Troubleshooting

+My To Do Items



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