CSUDH

Workforce Administration:
Assign or Update a Separation Checklist
HCM 9.0 Business Process Guide

Table of Contents

Introduction

This business process guide provides step by step direction on the assignment of a separation checklist to an employee.
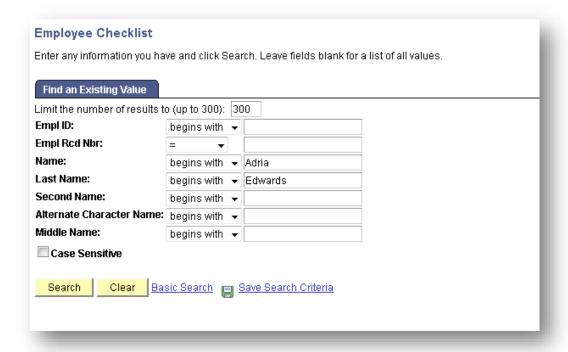
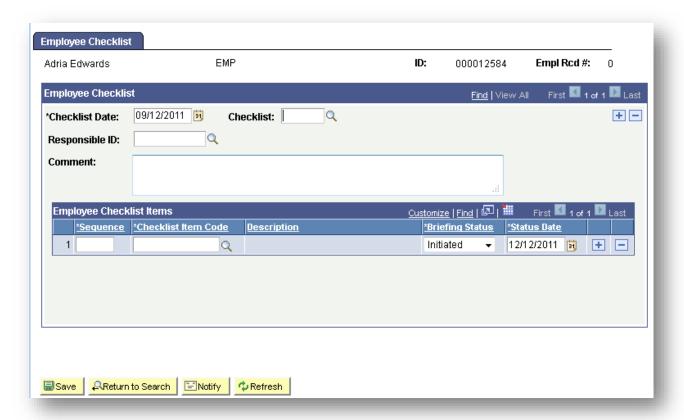## Processing Steps

Assign Checklist

Navigation: Workforce Administration > Personal Information > Organizational Relationships > Person Assignment Checklist

- **Use the Find an Existing Value search page to find the employee to be assigned a (Separation) checklist.**
- **Enter only Empl (Employee) ID# or Name (Display name)/ Last Name; as it appears in PS.**
- **Click Search**

Employee Checklist

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

Find an Existing Value

Limit the number of results to (up to 300):	300	
Empl ID:	begins with ▼	
Empl Rcd Nbr:	= ▼	
Name:	begins with ▼	Adria
Last Name:	begins with ▼	Edwards
Second Name:	begins with ▼	
Alternate Character Name:	begins with ▼	
Middle Name:	begins with ▼	

☐ Case Sensitive

Search | Clear | Basic Search | 💾 Save Search Criteria

- **You'll be routed to the Checklist screen**

NOTE: If the employee already has a checklist assigned it will be visible here. To assign an additional checklist, use the   button to create a new row for the assignment of an additional checklist. If the page is blank data can be entered directly. Enter the following fields:

1. **Enter the Effective date of the Termination of Employment (NOT THE LAST DAY WORKED)**

2. **Click the Checklist lookup (magnifying glass)**

   - **Select 'Employee Separation Checklist'**

3. **Click the Responsible ID lookup (magnifying glass)**

   - **Enter the name of the responsible MPP**

   - **Select the appropriate person from the list**

4. **Enter comments related to the checklist or employee situation**

5. **Click Save**

Employee Checklist

Adria Edwards EMP ID: 000012584 Empl Rcd #: 0

Employee Checklist

Find | View All First ◄ 1 of 1 ► Last

*Checklist Date:	09/12/2011 📅 **Checklist:** CHKOUT 🔍 Employee Separation Checklist ➕ ➖
Responsible ID:	🔍
Comment:	

Employee Checklist Items

Customize | Find | 🔲 | 🎞 First ◄ 1-11 of 11 ► Last

	*Sequence	*Checklist Item Code	Description	*Briefing Status	*Status Date		
1	100	CSHIER 🔍	Cashiers Office	Initiated ▼	12/12/2011 📅	➕	➖
2	101	COMP 🔍	Computer services	Initiated ▼	12/12/2011 📅	➕	➖
3	102	PHY 🔍	Physical Plant	Initiated ▼	12/12/2011 📅	➕	➖
4	103	IMS 🔍	Instructional Media Services	Initiated ▼	12/12/2011 📅	➕	➖
5	104	LIB 🔍	Library Services	Initiated ▼	12/12/2011 📅	➕	➖
6	105	ACCT 🔍	Accounting	Initiated ▼	12/12/2011 📅	➕	➖
7	106	PCLAS 🔍	Procurement	Initiated ▼	12/12/2011 📅	➕	➖
8	107	ADMIS 🔍	Admissions & Records	Initiated ▼	12/12/2011 📅	➕	➖
9	108	TEL 🔍	Telecommunications	Initiated ▼	12/12/2011 📅	➕	➖
10	109	HR 🔍	Human Resources	Initiated ▼	12/12/2011 📅	➕	➖
11	110	RDSHR 🔍	Rideshare	Initiated ▼	12/12/2011 📅	➕	➖

💾 Save | 🔍 Return to Search | 📧 Notify | 🔄 Refresh

Correcting a Checklist

Navigation: Workforce Administration > Personal Information > Organizational Relationships >
                 Person Assignment Checklist

➢ **If an error is made in the checklist date a new checklist must be generated. The notification can't be updated or changed.**

• **Follow the steps above to navigate to the checklist**

• **The most current effective dated checklist will be shown initially**

• **Click the plus sign on the top right**

• **A new page will appear to be used**

• **Follow the steps above to create a 'new' checklist**

Employee Checklist						

Adria Edwards   EMP   **ID:**   000012584   **Empl Rcd #:**   0

Employee Checklist   Find | View All   First ◀ 1 of 1 ▶ Last

*Checklist Date: 09/12/2011 📅   **Checklist:** CHKOUT 🔍   Employee Separation Checklist   ➕ ➖

Responsible ID: [   ] 🔍

Comment: [   ]

Employee Checklist Items   Customize | Find | 📄 | ▦   First ◀ 1-11 of 11 ▶ Last

	*Sequence	***Checklist Item Code**	**Description**	***Briefing Status**	***Status Date**		
1	100	CSHIER 🔍	Cashiers Office	Initiated ▾	12/12/2011 📅	➕	➖
2	101	COMP 🔍	Computer services	Initiated ▾	12/12/2011 📅	➕	➖
3	102	PHY 🔍	Physical Plant	Initiated ▾	12/12/2011 📅	➕	➖
4	103	IMS 🔍	Instructional Media Services	Initiated ▾	12/12/2011 📅	➕	➖
5	104	LIB 🔍	Library Services	Initiated ▾	12/12/2011 📅	➕	➖
6	105	ACCT 🔍	Accounting	Initiated ▾	12/12/2011 📅	➕	➖
7	106	PCLAS 🔍	Procurement	Initiated ▾	12/12/2011 📅	➕	➖
8	107	ADMIS 🔍	Admissions & Records	Initiated ▾	12/12/2011 📅	➕	➖
9	108	TEL 🔍	Telecommunications	Initiated ▾	12/12/2011 📅	➕	➖
10	109	HR 🔍	Human Resources	Initiated ▾	12/12/2011 📅	➕	➖
11	110	RDSHR 🔍	Rideshare	Initiated ▾	12/12/2011 📅	➕	➖

💾 Save   🔙 Return to Search   ✉ Notify   🔄 Refresh

Employee Checklist - Page Fields Defined

🔑 For a detailed explanation of the field terms, see the Field Type Legend at the end of this document.

Field	Notes	Definition
Effective Date	Required	Enter the date on which the checklist should be assigned to the employee. If assigning the CHKOUT checklist, use the employees reported termination date. This field will be used as the termination date in the workflow email notifications for terminations.
Checklist	Required	Enter or select the checklist code to be assigned to the employee.
Comments	Optional	Optional field to collect relevant general comments.
Briefing Status	Required	Initialized and Completed are the only values that should be used in this field.
Status Date	Required	Set this to the date on which the Briefing Status was effective.