



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

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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):

Empl ID:	begins with ▾	<input type="text"/>
Empl Rcd Nbr:	= ▾	<input type="text"/>
Name:	begins with ▾	<input type="text" value="Adria"/>
Last Name:	begins with ▾	<input type="text" value="Edwards"/>
Second Name:	begins with ▾	<input type="text"/>
Alternate Character Name:	begins with ▾	<input type="text"/>
Middle Name:	begins with ▾	<input type="text"/>

Case Sensitive

[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: 2 Checklist: Employee Separation Checklist

Responsible ID: 4 Comment:

Employee Checklist Items Customize | Find | First 1-11 of 11 Last

	*Sequence	*Checklist Item Code	Description	*Briefing Status	*Status Date		
1	100	CSHIER <input type="button" value="Q"/>	Cashiers Office	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	101	COMP <input type="button" value="Q"/>	Computer services	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3	102	PHY <input type="button" value="Q"/>	Physical Plant	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
4	103	IMS <input type="button" value="Q"/>	Instructional Media Services	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
5	104	LIB <input type="button" value="Q"/>	Library Services	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
6	105	ACCT <input type="button" value="Q"/>	Accounting	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
7	106	PCLAS <input type="button" value="Q"/>	Procurement	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
8	107	ADMIS <input type="button" value="Q"/>	Admissions & Records	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
9	108	TEL <input type="button" value="Q"/>	Telecommunications	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
10	109	HR <input type="button" value="Q"/>	Human Resources	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
11	110	RDSHR <input type="button" value="Q"/>	Rideshare	Initiated	12/12/2011 <input type="button" value="31"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

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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						
*Sequence	*Checklist Item Code	Description	*Briefing Status	*Status Date		
1	100	CASHIER	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.