

# Working with Employee Checklists

Last Modified on 10/06/2021 1:11 pm EDT

As a manager or administrator, you can assign checklists to employees to guide them through tasks and paperwork they need to log or submit in Würk.

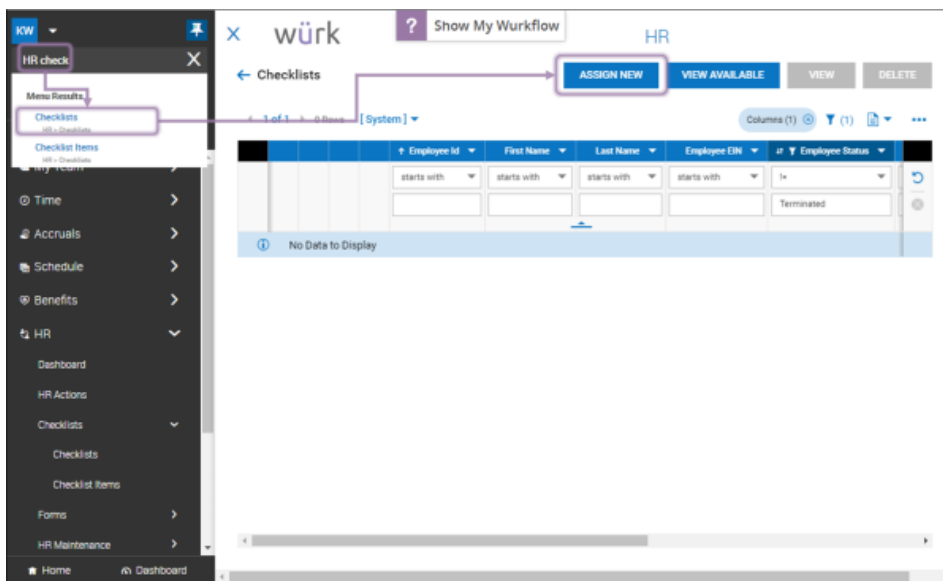
A checklist is a list of to-dos, often including forms, personal identification documents and information, and sometimes tasks outside of Würk, that you assign to an employee so that it appears in their inbox. The most typical checklists assigned to employees in Würk include:

Onboarding Checklists, Job Applicant Checklists, and Performance Review Checklists. Your company may have configured additional, more specialized checklists (typically during Implementation).

To begin, watch this video.

## START HERE

1. From the main menu, search for *HR Checklists* (or navigate to **Team>HR>Checklists>Checklists**) and select the **HR Checklists** option. Then click **ASSIGN NEW**.



2. In the popup that appears, first select the checklist you'd like to assign. Then click **Browse** to find one or more employees.

**Assign New Checklist** [X]

Please select checklist type to add

Employee(s) \*

To find one or more employees to assign this checklist to, click Browse

**Browse...**

Onboarding (Full-Time)

CANCEL SAVE

3. Select the employee(s). If you know of a predefined group of people you'd like to assign the checklist to, use the **Company Groups** tab. Once you have selected all the employees you want, click **APPLY**.

**Browse and Select Employees** [X]

Employees Company Groups Selected (0)

Page 1 of 2 1 - 10 of 11 Rows Search Employees

	Employee Name	Employee ID	Username	EIN
<input type="checkbox"/>	Ashley Nelson	00130	ANelson15	D&D
<input type="checkbox"/>	Beth Bowman	123	BBowman38	D&D
<input type="checkbox"/>	Cathy Jones	00132	CJones17	D&D
<input type="checkbox"/>	Harold Larkin	00126	HLarkin12	D&D
<input checked="" type="checkbox"/>	Jennifer Jones	00135	JJones20	D&D
<input type="checkbox"/>	Katie Waters	00122	KWaters11	D&D
<input type="checkbox"/>	Kenton Clarkson	00128	KClarkson14	D&D
<input type="checkbox"/>	Lauren Dubois	00127	LDubois13	D&D
<input checked="" type="checkbox"/>	Michael Donaldson	00133	MDonaldson18	D&D
<input type="checkbox"/>	Nicholas Reagan	00134	NReagan19	D&D

CANCEL ADD TO SELECTION APPLY

You can choose individual employees using these checkboxes

You can select groups of employees on this tab

Click here to add people to your list and continue looking for more

Click here to use the list of people you've created and proceed to choosing a checklist to assign

4. Click **SAVE** to confirm.

## Assign New Checklist

Please select checklist type to add


Employee(s) \*

Employees (4)

Checklist \*

Onboarding (Full-Time)

CANCEL SAVE

5. The screen refreshes to show you the checklists you assigned, including their Status. To work with an employee's checklist, click the Edit  icon.

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Checklists

ASSIGN NEW VIEW AVAILABLE VIEW DELETE

4 Checklist(s) assigned.

Page 1 of 1 1-4 of 4 Rows Saved: [System]

	Employee Id	First Name	Last Name	Employee EIN	Employee Status	Checklist Status	Category	Checklist Name	Created	% Completed
	starts with	starts with	starts with	starts with	Is	=	=	=	=	=
	00126	Harold	Larkin	D&D	Active	Open	Onboard	Onboarding (Full-Time)	03/16/2020 03:51p	-
	00128	Kenton	Clarkson	D&D	Active	Open	Onboard	Onboarding (Full-Time)	03/16/2020 03:51p	-
	00134	Nicholas	Reagan	D&D	Active	Open	Onboard	Onboarding (Full-Time)	03/16/2020 03:51p	-
	00135	Jennifer	Jones	D&D	Active	Open	Onboard	Onboarding (Full-Time)	03/16/2020 03:51p	-

To work with the employee's checklist, click here

To see a list of the items in the checklist, click here

6. You can help the employee update the checklist by manually keying in information, uploading documents, or simply updating status. For example, if the employee submitted a paper I9 form, you can mark the status for that checklist item as complete.

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Checklist

Kenton Clarkson (D&D) (3160) (31702)

Checklist: Onboarding (Full-Time) (Onboard)

Incomplete (1 out of 10) 0%

Started on 03/16/2020

Your Information (4) 0% complete

- Verify/Update Personal Information
- Verify/Update Contact Information
- Add an Emergency Contact
- Email an Direct Deposit

Required Employment Forms (2) 0% complete

- My Federal Tax Withholding
- My State Tax Withholding
- Form I-9 Employment Authorization

Company Policies & Procedures (1) 0% complete

- Employee Handbook

Employment Notices (1) 0% complete

- FMLA Employee Guide

Benefits Enrollment (1) 0% complete

- Email in Your Benefits

Form I-9 Employment Authorization

Click the link above, then click the "Add New" button at the top right, then complete your portion of the Form by filling in the remainder of the information that did not prepopulate. Once finished, click "Submit". NOTE: All required fields including "Other last names (if any)", "middle initial" have a value type "S" - if they do not apply.

IMPORTANT: Please bring original documents to verify your eligibility to work in the U.S. to Human Resources so they can complete their portion of your I-9.

View Your I-9 Forms

Due Date: 04/30/2021 (Overdue) Waiting On: Kenton Clarkson

You can change the checklist or upload paper documents from this menu

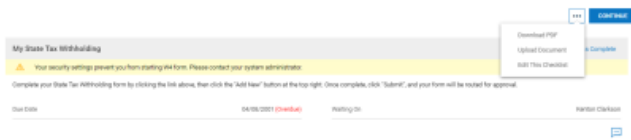
When this shows, you can mark an item as complete.


Download PDF Upload Document Get This Checklist CONTINUE

Mark as Complete

Use these tabs to navigate each section of the checklist

If you see the error message, "Your security settings prevent you from starting XX form. Please contact your system administrator.", you may be able to override this by uploading a paper document for the employee and then **Mark as Complete**.



7. Use the **CONTINUE** button to advance through the checklist. Once done, you can use the Back  arrow to return to where you started. We recommend that you remind the employee to check his or her ToDos for status.

If your checklist calls for the employee to complete a government form, Work enables them to complete the form electronically and ensures that the latest forms are used. You can also manually enter employee government forms in the Employee Information record. See [Entering W4 Forms Manually](#).

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