

Working with Employee Checklists

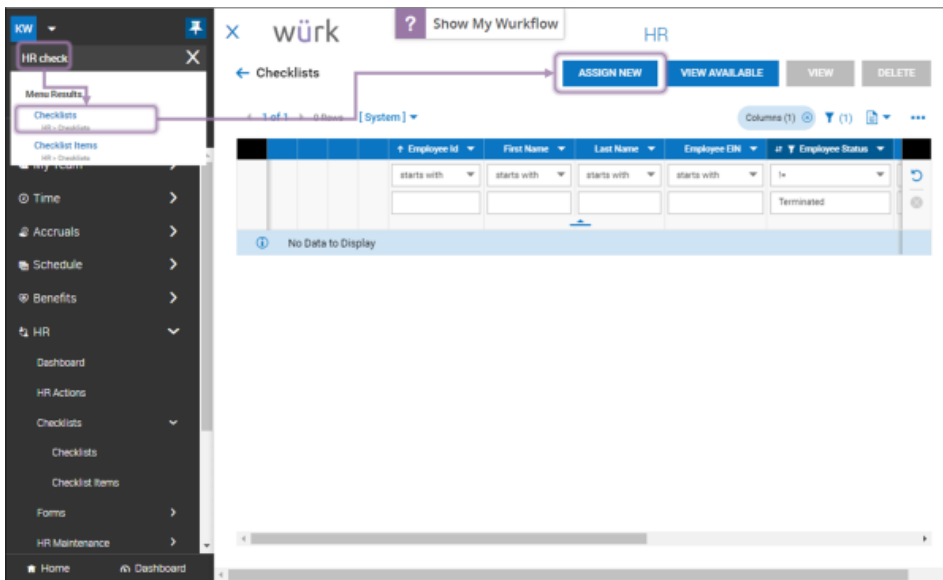
Last Modified on 09/20/2023 12:01 pm EDT

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 Wurk.

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

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

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.

Choose a checklist to assign

Assign New Checklist

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**.

You can select groups of employees on this tab

Browse and Select Employees

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

You can choose individual employees using these checkboxes

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

CANCEL ADD TO SELECTION APPLY

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 will refresh to show all Checklists assigned to employees, including the current status of each Checklist. If needed, a user with Administrative rights in Wurk can edit items and completion statuses in an employee's individual Checklist, for example, if an employee had completed the Checklist item outside of Wurk.

To Edit a Checklist: Locate the Checklist then click the Edit (pencil) icon next to the Checklist, then: - Mark Checklist Items as Complete: Click the ellipsis located in the Checklist on the left side then "Edit this Checklist". Locate the item and click the Edit (pencil) icon, then check off the box next to "Complete".

-To Remove Checklist Items: Click the ellipsis located in the Checklist on the left side then "Edit this Checklist". Click the "x" next to the item to remove it.

- Complete Checklist Items on Behalf of the Employee: After clicking the Edit (pencil) icon next to the employee's Checklist, all items will be listed on the left side. If a "Security Violation" is displayed upon clicking on an item to complete, this item must be completed by the employee and can't be completed by an Admin (i.e. W-4, I-9 forms)

A Note of Caution: DO NOT complete HR Actions (i.e. Update My Direct Deposit) on behalf of an employee! The changes will be reflected in the employee's record, however, once completed, it will show in YOUR (the initiating user's) "Submitted" Actions.



Checklists

ASSIGN NEW VIEW AVAILABLE VIEW DELETE

4 Checklist(s) assigned.

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

Columns (1) (1)

To work with the employee's checklist, click here

	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	=	=	=	=	=	=
					Terminated					
	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 see a list of the items in the checklist, click here