

## 9.2 Creating a Checklist

**Purpose:** Use this document as a reference for creating a checklist using Workforce Administration in ctcLink.

**Audience:** Human Resources Specialist and Payroll Specialist.

**!** You must have at least one of these local college managed security roles:

- ZC HR Employee Maintenance
- ZC HR Position Management
- ZD HR Employee Maintenance VW
- ZD HR Inquiry
- ZZ HR Employee Maintenance
- ZZ HR Local Configuration
- ZZ HR Position Management

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Use the Person Checklist to create checklists for processing employee hires and other administrative tasks.

**Note:** Consult with the local HR Team for a complete list of checklists used in the organization.

### Create a Checklist

**Navigation:** NavBar > Navigator > Workforce Administration > Personal Information > Organizational Relationship > Person Checklist

1. The **Person Checklist** search page displays.
2. Enter the **Empl ID**.
3. Select the **Search** button.

### Person Checklist

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

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID

Name

Last Name

Second Last Name

Alternate Character Name

Middle Name

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

4. The **Person Checklist** page displays.
5. The current date defaults in the **Checklist Date** field.
6. Select the **Checklist** lookup icon.

### Person Checklist

Person ID 101000001

**Checklist History**  1 of 1 [View All](#)

\*Checklist Date 06/14/2019

\*Checklist

Comment

**Person Checklist Items**

*Sequence	*Item Code	Description	*Status		
<input type="text"/>	<input type="text"/>		Initiated <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

[Save](#) [Return to Search](#) [Notify](#)

7. The **Look Up Checklist** pagelet displays.
8. Select the appropriate checklist.

**Person Checklist**  
**Look Up Checklist**

Checklist Code begins with

Description begins with

Checklist Type =

**Search** **Clear** **Cancel** [Basic Lookup](#)

Search Results

View 100  1-7 of 7

Checklist Code	Description	Checklist Type
DEUHIR	Hire	Hiring
DEUTER	Termination	Terminate
DEUXFR	Transfer	Transfer
HCCWR	Add Contingent Worker Instance	Org Inst
HCEMP	Add Employment Instance	Org Inst
HCPOI	Add Person of Interest Inst.	Org Inst
NLDABS	Netherlands Monitor Absences	Medical

9. The **Personal Checklist Items** will display.
10. Select the **[+]** button to add new items to the list.
11. Select the **[-]** button to delete items from this list.
12. Select the **Save** button.

Person ID 101000001

Checklist History   1 of 1  View All

\*Checklist Date 00/14/2019

\*Checklist DEUHIR  Hire

Comment

**Person Checklist Items**

1-15 of 15

*Sequence	*Item Code	Description	*Status	Link ID		
50	HIR10	Personal Data	Initiated	Personal Data	<b>+</b>	<b>-</b>
100	HR20	Send Contract	Initiated	Send Contract	+	-
200	HR30	Signed contract received	Initiated	Signed contract received	+	-
300	HIR40	Hire Applicant	Initiated	Hire Applicant	+	-
400	HIR50	ID Badge	Initiated	ID Badge	+	-
420	HIR60	Request Security Access	Initiated		+	-
450	HIR70	Tax Card Received	Initiated		+	-
500	HIR80	Update Tax Data	Initiated	Update Tax Data	+	-
550	HIR100	Insurance Passport Available	Initiated		+	-
600	HIR110	Update Social Insurance	Initiated	Update Social Insurance Data	+	-
650	HIR120	Child Benefit Information	Initiated		+	-
700	HIR130	Bank Information	Initiated	Bank Information	+	-
800	HIR140	Company Car	Initiated	Company Car	+	-
900	HIR150	Probation Period	Initiated	Probation period	+	-
1000	HIR160	Eintrittslichttag	Initiated		+	-

**Save** **Return to Search** **Notify**

13. The process to create a checklist is now complete.

14. End of procedure.