

CALIFORNIA STATE UNIVERSITY, DOMINGUEZ HILLS

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

Enter any information you have and click Search. Leave fields blank for a list of all values.						
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 👻						
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Search Clear Basic Search 🔳 Save Search Criteria						

• You'll be routed to the Checklist screen

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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

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Save QReturn to Search ENotify QRefresh

#### 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

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## Employee Checklist - Page Fields Defined

Sor 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.