

New Innovations (RMS) Onboarding Training



2023

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Intro to Checklists

Checklists are interactive to-do lists you can send to residents and fellows. You can build three types of checklists:

- Onboarding Checklists- Collect information and documents from new hires or trainees who will be coming from another program in your institution.
- Advancement Checklists- Obtain data and forms from residents and fellows who are advancing to another level of training in the same program.
- Rotation Checklists- Assign tasks and distribute information to any personnel with a training record on any rotation, provided that rotation exists on a block schedule.

After creating a checklist, you'll distribute it to your trainees.

Access

People with the privilege levels listed below in the Personnel module have the following access to Checklists:

- Level 6 - Users have full access to build, distribute and manage Checklists for all departments.
- Level 5 - Users can build, distribute and manage Checklists in departments where they have privileges; May be restricted by Level 6 for certain Checklists or Steps.
- Level 4 - View Checklists
- Level 3 - N/A
- Level 2 - Residents can be recipients of a checklist
- Level 1 - Additional Reviewers can manage steps they have been assigned to

Only people with the work role of Resident can access and complete checklists assigned to them. Faculty cannot receive checklists.

Creating Checklists

For more information about Checklists go to [Help>Tutorial Videos>\[3.09\] Personnel-Create Checklists](#)

All three types of checklists are constructed the same way.

1. Go to **Personnel > Checklists > Select Onboarding, Advancement or Rotation**
2. Click **New**
3. Enter a Name and Instructions
4. Check the 'Checklist for Administrator Only' box if this checklist will only be viewed and used by administrators. If this box is checked, the residents/fellows will not see this checklist.
5. Check the 'Required for Advancement' box if residents must complete this checklist by the due date in order to advance to the next level of their training (status and PGY level).

You can set due dates when distributing checklists.

Caution: If you use this feature and a resident or fellow does not advance because of it, their status on the Block Schedule will not advance and the old status will be displayed. This means:

- When evaluations are created, the old status will be used and the resident or fellow will fall within the peer group of the old status
- When conference rosters are built, the old status will be used, not the new status

6. Check 'Allow marking required steps' to pick which steps should be required for residents to complete
 - Checking this option will automatically check 'Include attestation at the end of the checklist'
7. Check 'Include attestation at the end of the checklist' for residents to authenticate the information they provided (after all steps are either in Complete or Pending status)

- Customize the attestation verbiage

Name
 Remaining Characters: 31

Instructions
 Remaining Characters: 1000

☐ Checklist for administrator use only

☐ Required for Advancement

☒ Allow marking required steps

☒ Include attestation at the end of the checklist

Attestation Verbiage
 Remaining Characters: 895

8. If you are a Level 6 you have these options:

Level 6 Options

Allow level 5 administrators to:

☒ Complete steps

☐ Complete steps that have additional reviewers

☒ Modify step requirements

☒ Delete this checklist

1. Click **Level 6 options**
2. Limit what an L5 administrator can do with a checklist. Check which options you'd like to limit. Even with the boxes *unchecked*, L5 administrators can still view uploaded files, edit text boxes and return steps to recipients.

9. Click **Save Checklist Settings**

When you create your checklist, you have the option to create a brand new step or to add an existing step.

Add a new step

1. Click **Add Step**
 2. Add a step name
 3. Enter instructions for the recipient in Recipient
 4. Enter instructions that only administrators can see in Administrator
 5. Add a date that the step is due to be completed
- Step due dates:
- Are only linked to the single step instance on the current checklist
 - Do not copy when you copy a checklist
 - Cannot be changed for individual recipients

- Unlike *checklist* due dates, are only visual prompts for checklist recipients. Step due dates have no other functions besides appearing on the step as a timing prompt to the recipient.
6. Click **Add Step**. A new menu will appear
 7. Optional: 'Recipient can mark as complete'. This option allows the recipient to mark steps complete on the checklist. If you want an administrator to review and mark the step complete instead of the recipient, **uncheck** the box. If you need to review the uploaded document do not leave this box checked.
 8. Check '**Step for Administrator use only**' if only the administrator will see this step, but the recipient will not

Set other options

Add a Hyperlink

Use this feature to give recipients access to online materials.

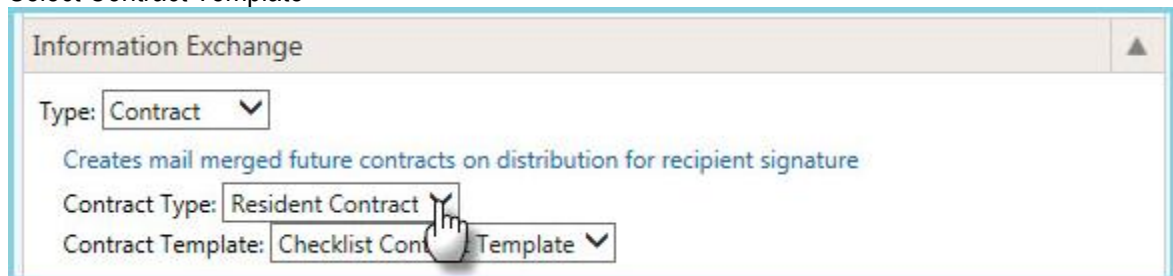
1. Click **Hyperlink**
2. Enter a name for the link. This is the text that the recipient will click on to view the information.
3. Enter the URL (web address)
4. Click **Save Link**

Information Exchange

Use this feature to:

- Provide files for recipients
 - Request a file from recipients. Allow them to upload multiple files (Limit of 5). Files can be a Microsoft Word document or in PDF format. Limit 12 MB each.
 - Provide a text box for the recipient to enter information
 - Supply recipients with a form to complete
 - Move uploaded files to a selected folder in Files & Notes
 - Confirm receipt of Sponsor and Program policies
 - Distribute Contracts
1. Select a Type:
 - [Provide a File](#) if you only want the recipient to download and view a document that you supply

- [File Upload](#) to require the recipients to upload a file.
 - Check the appropriate boxes so that recipients can attach a file, view a file, or upload multiple files
 - Optionally specify a folder in Files & Notes where the document will be moved upon step completion. If no folder is specified, all documents will be moved to the Onboarding folder. Click Upload File to attach a document for the recipient to view
 - Recipients can upload up to five documents. After that, they'll get a popup letting them know they've reached the limit. Files can be uploaded at any time until the step is marked complete.
- [Text Box](#), to have the recipient enter information in a field. Limit of 25 characters.
 - You can also provide a document to the recipient in this step by clicking Upload File. When this option is used, the text is not exportable.
 - When text is added to the field, it cannot be exported to another application or to another module.
 - Suggestion: if you want to collect data to be added to Personnel, such as license or certification information, use the Form option. Add the correct fields to the Form and add the form to the Checklist.
- [Form and the form name](#), if you want to have the recipient complete a form with Personnel information. The form is created using fields linked directly to the recipient's personnel file so that when they enter information, it can be loaded automatically and sent to the corresponding personnel field. A form must be created before it can be attached to a checklist.
- [Policy](#) to have the recipient confirm receiving your institution's policies. Check Sponsor Policies if you want the sponsor policies distributed to the resident. Check Program Policies if you want the program policies distributed to the resident. Policies can be uploaded into the software in the Sponsor and Program pages before or after this step is added to a checklist.
- [Contract](#) to distribute contracts electronically through checklists. The word 'Contracts' will only appear in the drop-down list if the Future Contracts setup has been configured.
 - Select Contract Type
 - Select Contract Template



The screenshot shows a web form titled "Information Exchange". It contains the following elements:

- A "Type:" dropdown menu with "Contract" selected.
- A blue text instruction: "Creates mail merged future contracts on distribution for recipient signature".
- A "Contract Type:" dropdown menu with "Resident Contract" selected. A mouse cursor is pointing at this dropdown.
- A "Contract Template:" dropdown menu with "Checklist Cont" (partially visible) and "Template" (partially visible) as options.

- [Immunizations to](#) allow recipients to enter information about required immunizations. Administrators can review and confirm receipt once distributed and completed. Immunizations data is automatically stored in personnel records upon either the learner or administrator submitting the information. Level 5 privileges are subject to settings applied in Customized Security.

Conditional Recipients

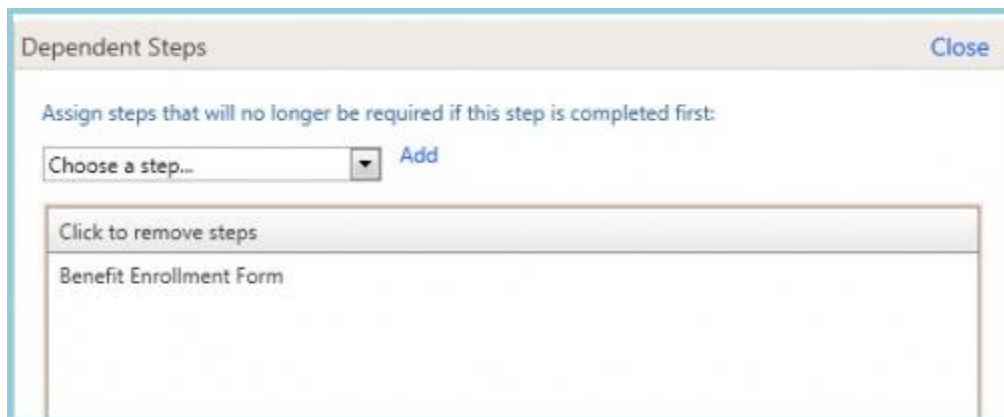
Setting up Conditional Recipients is optional and allows you to assign steps to a subgroup of recipients who meet select criteria. An example is foreign medical students who require a Visa. You can designate only those recipients who require a Visa to see the Visa step. Domestic graduates would not.

1. Click on the specific step
2. Click on **Conditional Recipient**
3. Select the condition for distributing this step
4. Click **OK**

Dependent Steps

You can create relationships between steps so that if one is completed, its dependent steps are no longer required. For example, you may use this feature if you are asking your residents if they plan to enroll in your benefits program. If they waive their benefits, then they wouldn't be required to complete benefit enrollment forms. In this case, you might have two steps: One to complete a waiver and one to enroll in the benefits program. If they opt to complete the waiver, they will no longer be required to complete the enrollment form.

1. Click on the specific step
2. Click on the **Dependent Steps**
3. Choose a step - (Note: Steps must be created prior to using this feature)
4. Click **Add**



Click to remove steps
Benefit Enrollment Form

Additional Reviewers

For more information about Checklists go to [Help>Tutorial Videos>\[3.11\] Personnel-Onboarding for Additional Reviewers](#)

You can set up a step so that people outside of your program can approve or complete a step. An example might be when tax information should be sent to Human Resources for processing. Create the person's profile in Personnel and give the HR person Level 1 privileges in Personnel. This allows the HR person to appear in the list of reviewers. Then go to your checklist:

1. Create the step
2. Attach document or allow the recipient to upload a document
3. Go to Additional Reviewers section and select person's name from the list

The screenshot shows a software interface with two main sections. The top section, titled 'Information Exchange', has a 'Type:' dropdown menu set to 'File Upload'. Below this, there are two options: 'Require a file upload for completion' and 'Recipient can'. Under 'Recipient can', there are two checked checkboxes: 'upload files' and 'view uploaded files'. Below these is a label 'Specify the personnel folder where files will be moved upon completion' followed by a dropdown menu set to 'Onboarding'. The bottom section, titled 'Additional Reviewers', has a 'Provide a file to the recipient' label and an 'Attach File' button. Below this is a list of 'Selected reviewers' with the text '(click to remove)'. The list contains one entry: 'Valarie Todd'. At the bottom of this section are three links: 'Add reviewers', 'Save as a review group', and 'Use existing review group'.

4. Click **Add Existing Step**
5. Choose a Step
6. Click **Add**

The screenshot shows a 'New Checklist' form. At the top, there are three buttons: 'Add Step', 'Add Existing Step', and 'Delete Step'. Below these buttons is a large empty text area. To the right of the text area, there is a label 'Select an existing step to add to list (View all departments)' and a dropdown menu with the text 'Choose a step...'.

Manage steps

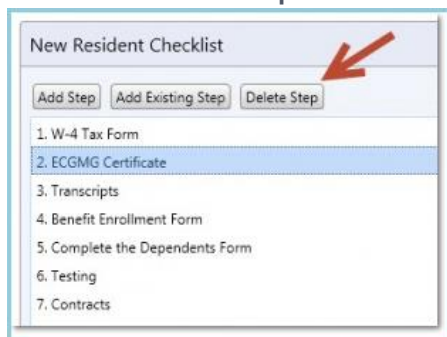
Edit the name of a step

The name of a step on a new checklist can be edited by clicking on the step and making edits. However, use caution when editing the name of a step on a checklist in use. **The edit will saved to every checklist where the step is used and the edit may change the meaning of the question and therefore making the previous responses invalid.**

Remove steps

You can remove a step from your checklist before it has been distributed by following these instructions:

1. Go to **Personnel** > Checklists > **Onboarding/Advancement/Rotation**
2. Click on a checklist
3. Click **Edit**
4. Click the step to remove
5. Click **Delete Step**



Notes about deleting steps:

- If it is a step you created, the step will be permanently deleted.
- If it is an existing step, it will be removed from your checklist only, but it will remain on other checklists.
- If your checklist has been distributed and some residents have completed the step, you will not be able to delete the step until you delete the information/documents submitted by your residents.

Checklist Forms

For more information about Checklists go to [Help>Tutorial Videos>\[3.14\] Personnel-Checklist Forms](#)

Forms gather information from the checklist recipient and automatically insert it into that person's personnel profile. Fields that are available on the form correspond with fields from the Personnel module. The form is added as a step to a checklist in the Information Exchange section. Checklist forms can be used for:

- Onboarding
- Advancement
- Rotation

You must have level 5 or 6 privileges in Personnel to create forms. Some fields on the forms may not be available for a level 5 user if the corresponding field in Personnel is restricted by Customized Security.

The recipients will be able to see what current data they have in the system and can choose to add to or change it.

Transferring checklist form data to Personnel Profile

You can send a form to someone asking them for information. Once approved by the administrator, that information is then transferred to the appropriate field in the person's Personnel record. Documents attached to the step are no longer available in the checklist once the step is completed.

Widget	Save Logic
Address	Replaces address of configured type
Birth Place	Updates values
Certifications	Adds New
Citizenship	Replaces Citizenships
Credentials	Replaces Credentials
Date of Birth	Updates value
DEA License	Updates Dates if same number, otherwise Adds new
ECFMG	Updates values if they exist

Email	Updates if primary email type configured, otherwise Adds new
Emergency Contacts	Adds New
Ethnicity	Replaces Ethnicities
Family Members	Adds New
Gender	Updates value
General Education	Adds New
ID Number	Adds New
Lab Coat Size	Updates value
Languages	Replaces Languages
Marital Status	Updates value
Medical Education	Updates existing if overlap otherwise adds new
Military Service	Updates value
NPI	Updates value
Permits	Updates Dates if same number, otherwise Adds new
Phone Numbers	Adds New

Practices	Adds New
Preferred Name	Updates value (22 characters)
Social Security	Updates value
State License	Updates Dates if same number, otherwise Adds new
Test Scores	Adds New
Visas	Adds New

Create a Form

1. Go to *Personnel > Checklists > Onboarding/Advancement/Rotation*
2. Click Forms in the top right corner of the page.
3. Click **New**
4. Enter a name for the form
5. Add instructions for the recipient
6. Click Update
7. Select a field from the Add a Widget drop-down list
8. Click Add
9. Add instructions to replace the name of the widget
10. Click Update when finished
11. Click Return to Forms at the top right when the form is completed. The form is automatically saved as you create it.
12. Rearrange the widgets by clicking on the widget and dragging to the new position

Notes:

- On the Phone Widget, to have just a phone number field appear and not the extension, description, serial number, etc., check the box for 'Phone Number Only'
- On the Certificates Widget, make sure you specify the type of Certificate.

Add a Form to a Checklist

1. Go to *Personnel > Checklists > Onboarding/Advancement/Rotators*
2. Click on a checklist
3. Click Edit
4. Click Add Step
5. Enter the step name and instructions
6. Click Add Step
7. Click Settings in the Information Exchange section
8. For Type, select Form
9. Select the form you want to attach

The screenshot shows the 'Add a Widget' dropdown menu in the checklist editor. The menu lists various widgets that can be added to a checklist step. The widgets listed are: Address, Certifications, Citizenship, Credentials, Date of Birth, ECFMG, Education - General, Education - Medical, Email, Emergency Contacts, Ethnicity, Family Members, Languages, Marital Status, Military Service, NPI, Phone Numbers, Preferred Name, SSN/SIN, State Licenses, Test Scores, and Visa. The 'Add a Widget' button is highlighted in green at the bottom of the dropdown.

Notes:

- Steps that include forms: Once this type of step is committed to a person's file and marked complete, it cannot be switched back to incomplete because the data has already been committed to Personnel. And, the data no longer appears in the checklist.
- Customized Security is a way the New Innovations Super User can limit which fields the Administrators can modify in a person's record. If any of the widgets selected in the form and attached to the checklist are on the list of limited fields, the item cannot be committed to personnel records. For example, if the administrators are prevented from adding or editing ECFMG data, any ECFMG data added to a form cannot be moved to a recipient's record.

The Medical Education widget updates this part of the personnel record:

The screenshot shows the 'Medical Education Records' section in the personnel record. The section is titled 'Medical Education Records' and has a dropdown menu for 'Medical' and 'General'. The record for 'Ohio State University College of Medicine and Public Health - 03840' is displayed, showing the address '254 Meiling Hall 370 West Ninth Avenue Columbus, OH 43210-1238 United States' and the dates '8/1/2015 to 5/31/2019'. The 'Notes' section shows 'P. O. 182646 Columbus, OH 43218 USA'. The record was last updated on 2/3/2021 by NI Personnel.

Distributing Checklists

Checklists can be distributed:

- Automatically when a trainee is added to the system
- Manually by the administrator

You can distribute to all residents and fellows or just specific individuals based on certain criteria.

Notes:

- Onboarding Checklists- When the checklist is distributed, the resident will see a banner at the top of their Home Page with a link that says View Checklists. This is available until 30 days after the due date of the checklist. However, it will still be available in the Notifications panel of the Home Page if there are items to complete.

Criteria for Potential Recipients

Each checklist has criteria for displaying possible recipients.

Onboarding - Recipient is a new hire or changing to a new program

- Recipient has a current Training Record.
- When distributing a checklist, the available people are those whose Training Record has a start date in your program later than today's date

Advancement

Recipient is:

- Advancing to one of the following:
 - To the next year
 - Graduating
 - Becoming Faculty
- Advancing in both:
 - Status type
 - PGY level

Rotation

Resident or Fellow:

- Is in a home division with a current academic year
- Is owned by any sponsors (being owned by *principal* sponsors is not required)
- Is scheduled on a rotation that is:
 - On the block schedule
 - Owned by a department that has a current academic year
- If a training record/scheduled rotation of a trainee is altered, these checklists will still exist.

Distribution

Automatic Distribution sends the checklist at a specific time. Manual Distribution sends the checklist immediately. There is an option to hold the checklist and then release the checklist from hold when you are ready to make it available. This would be used if you wanted to have the checklist reviewed before release.

Onboarding

- Manual –Select the names of those residents whose training records have a start date later than today's date
- Automatic - Send to residents when their training record is added to Personnel

Advancement

- Manual –Select the names of those residents whose training records match the criteria you select:
 - Advancing to next training year in their current program
 - Graduating
 - Becoming Faculty
- Automatic – Select the number of weeks before their advancement date that you want checklists distributed to residents when their training record matches any of the conditions you select:
 - Advancing to next training year in their current program
 - Graduating
 - Becoming Faculty

Rotation

- Manual- Select the names of those residents who are trainees on a rotation
- Automatic-Distribute to residents in a program when they are either:
 - Added to Personnel
 - Added to the Block schedule on a rotation

Note: It is not recommended to distribute Visiting Student rotation checklists automatically at this time

Onboarding Checklists

Onboarding-Distribute Manually

To distribute a checklist 'manually' means that you send out the checklist when you are ready.

1. Go to **Personnel** > under Checklists: **Onboarding**
2. Click the Checklists tab
3. Click on a checklist
4. Click **Distribute**
5. Select an option for when the checklist is due
 - Select the number of weeks before or after the recipient's program start date
 - Add a due date
 - Indicate that there is no due date
6. Assign the checklist to a program
7. Select Onboarding type: Starting New Program (changing to different program) or New Learner (new Hire)
8. Select the people that should receive the checklist


9. Click Distribute
10. You may elect to hold the checklist for review. If this option is chosen you may release the checklist to individuals on the recipient list.
 - Click the link to access people with checklists on hold
 - Highlight those to release and click the release icon

Onboarding -Distribute Automatically

When you setup your checklist to be distributed 'automatically,' the checklists will be sent to recipients when their names are added to the database. This can be configured by program and available programs are based on the user's privileges to see them.

1. Go to **Personnel** > under Checklists: **Onboarding**
2. Click the Checklists tab
3. Click on a checklist
4. Click **Automatic**
5. To have the checklist sent to the recipient when their profile is added to the database, select On
6. Select an option for when the checklist is due
 - Select the number of weeks before or after the recipient's program start date
 - Add a due date
 - Indicate if there is no due date

7. Check the box to send this checklist to people
 1. when they are added to Personnel or
 2. who are changing programs
8. Click **Add Program** to choose programs where this checklist should be distributed
9. Click on the programs that should use this configuration
10. Click **Save**


 New Innovations ×

Automatic Distribution - New Resident Checklist

Automatically send this checklist to incoming learners when they are added to Personnel or people changing programs. ☐ Off ☒ On

Due Date

☒ Due weeks program start date

☐ Due on 

☐ No due date

Distribution

Distribute when added to personnel ☒

Distribute to people changing programs ☐

Apply to the following Programs (click to remove)

Internal Medicine

[Add Programs](#)

Save

Cancel

☒ Place on hold when created for review before recipient can access

Advancement Checklists

Advancement - Distribute Manually

To distribute a checklist 'manually' means that you send out the checklist when you are ready.

1. Go to **Personnel** > under Checklists: **Advancement**
2. Click the Checklists tab
3. Click on the checklist to distribute
4. Select an option for when the checklist is due
 - Select the number of weeks before or after the recipient's program start date
 - Add a due date
 - Indicate that there is no due date
5. Select the program
6. Select the Advancement Type
7. Click Distribute
8. You may elect to hold the checklist for review.
 - If this option is chosen, you may release the checklist to individuals on the recipient list.
 - Click the link to access people with checklists on hold

Distribute - New Checklist

Due Date

☒ Due weeks recipients' program start date

☐ Due on

☐ No due date

Assign Checklist

[All](#) | [None](#) | [Invert](#) Incoming Residents/Fellows

Person	Program
Brooks, Maggie	JGB Internal Med
Jones, Ashley	JGB Internal Med
Lemon, Julie	JGB Internal Med
Shaffer, Michael	JGB Internal Med

Advancement - Distribute Automatically

When using the 'automatic' distribution of your advancement checklist, you will determine which people will receive the checklist and when they will receive it.

1. Go to **Personnel** > under Checklists: **Advancement**
2. Click the Checklists tab
3. Click on the checklist to distribute
4. To have the checklist sent to the recipient when their profile is added to the database, select On
5. Click **Save**
6. Select an option for when the checklist is due
 - Select the number of weeks before or after the recipient's program start date
 - Add a due date
 - Indicate that there is no due date
7. Select when the checklist should be distributed prior to the advancement date
8. Check the Advancement Type
9. Select the programs to receive the checklist
10. Click Save when finished

The screenshot shows a web form titled "Automatic Distribution - Contracts - 3rd Year". At the top, it says "Automatically send this checklist to residents and fellows who are advancing" with radio buttons for "Off" and "On" (selected). Below this is a "Due Date" section with three options: "Due" (selected) with a dropdown for "3" weeks and a "Before" dropdown for "advancement date"; "Due on" with a date picker; and "No due date". The "Distribution" section has a "Distribute" dropdown set to "3" weeks before advancement date. It lists "Distribute to people who are:" with checkboxes for "Advancing to the next year", "Graduating", "Changing Program", and "Becoming Faculty". Below this is a section "Apply to the following Programs (click to remove)" with a text box containing "Currently there are no programs configured." and a link "Add Programs". At the bottom are "Save" and "Cancel" buttons, and a checked checkbox "Place on hold when created for review before recipient can access".

Rotation Checklists

Rotation- Distribute Manually

When you 'manually' distribute the checklist, you send it out when you are ready.

1. Go to **Personnel** > under Checklists: **Rotation**
2. Click Checklists
3. Click on the checklist to distribute
4. Advanced Filtering: To make it easier to locate your desired checklist, you can filter by
 - Person
 - Rotation
 - Start Date/End Date of Rotation (Note: This search function operates in terms of a range, rather than a specific date)
5. Select an option for when the checklist is due:
 - Select the number of weeks before or after the recipient's program start date
 - Add a due date
 - Indicate that there is no due date
6. Select the program
7. Select the people who should receive the checklist
8. Click **Distribute**

Person	Program
Brooks, Maggie	JGB Internal Med
Jones, Ashley	JGB Internal Med
Lemon, Julie	JGB Internal Med
Shaffer, Michael	JGB Internal Med

Rotation - Distribute Automatically

When using the 'automatic' distribution of checklists to trainees, you can choose to have the checklist sent to the resident or fellow when their name is added to the database or when they are added to the block schedule.

1. Go to **Personnel** > under Checklists: **Rotation**
2. Click Checklists
3. Click on the checklist to distribute
4. Click Automatic
5. Automatically send this checklist to residents and fellows when they are added to either A. Personnel Data or B. Block Schedule

- A. Personnel Data
 - 1. Select a due date
 - 2. Select a program
 - 3. Click **Save**
- B. Block Schedule
 - 1. Select a due date
 - 2. Select a program
 - 3. Select how the checklist should be distributed to people in the selected program:
 - Any time they are on a rotation
 - The first time they are on a rotation
 - Not the first time, but every subsequent time they are on the rotation
 - 4. You may also check the box to prevent the checklist from being sent to the recipient if they've already gotten it in the selected number of months
 - 5. Click **Save**

Checklist Notifications

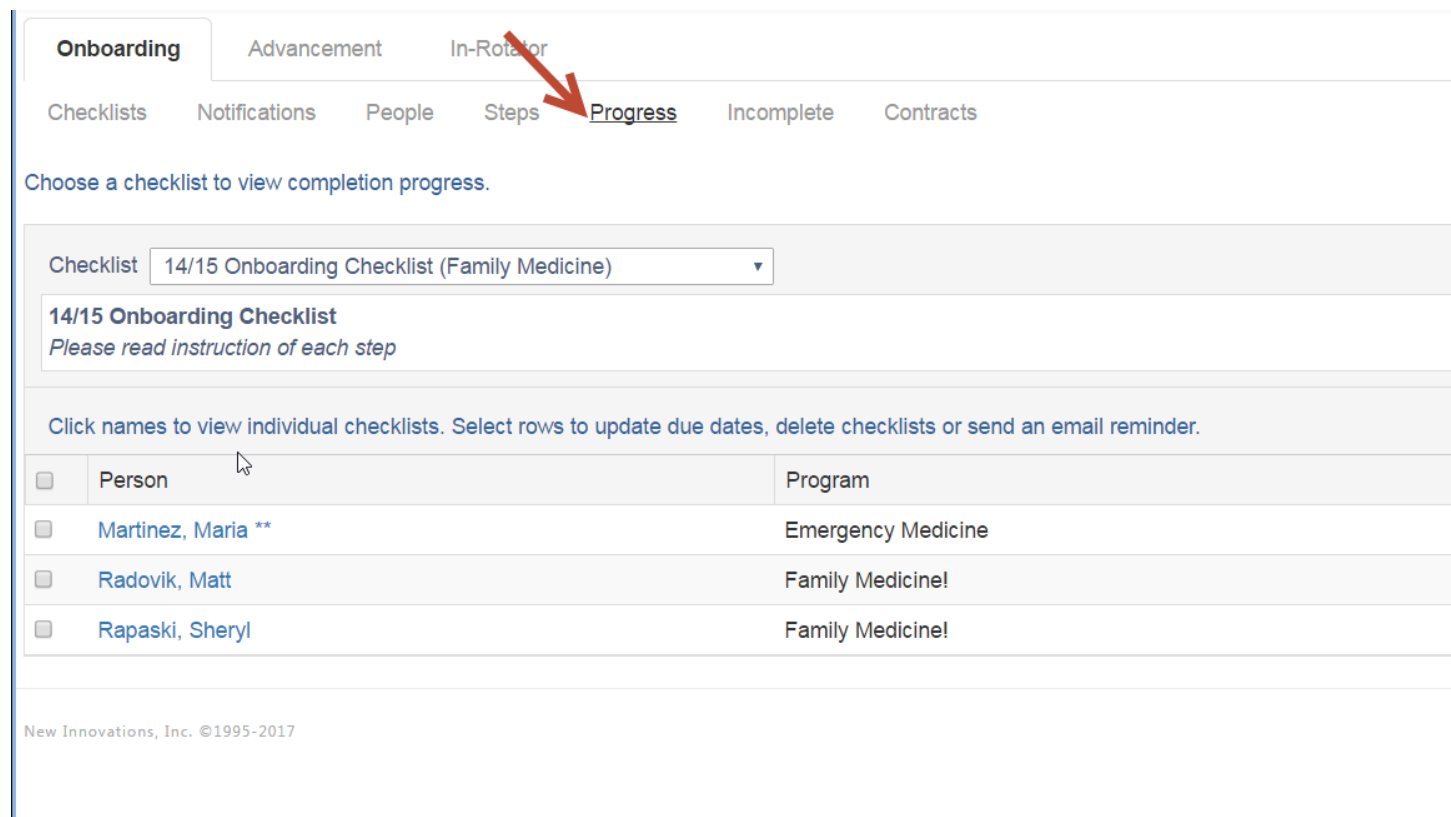
For more information about Checklists go to [Help>Tutorial Videos>\[3.13\] Personnel-Checklist Notifications](#)

Notifications can be sent to checklist recipients to let them know they have a checklist to complete and to remind them of pending or delinquent items. Administrators can receive a daily update of checklist progression. You may make as many email notifications as needed.

Each notification is sent in the daily consolidated email.

- Initial - Sent to recipients the day after a checklist is distributed to them
- Reminder - Sent to recipients with incomplete steps remaining on their checklist. This notification can be sent a designated number of days before the checklist is due.
- Complete - Sent to recipients the day after all checklist steps are completed
- Pending - Sent to administrators and additional reviewers when a step is completed by the recipient. Also sent people who have been designated in the notification configuration.
- Administrative – A daily progress summary sent to designated people
- Step Has Been Returned - Sent to recipient when an administrator has returned a step to them

Note: Initial emails cannot be resent automatically after distribution. However, you can manually send an initial email to someone at any time by going to the Progress tab, checking the person's name and selecting Initial Email from the Actions drop down list. Any type of configured email can be sent from the Progress Tab.



The screenshot shows the 'Progress' tab selected in the checklist management interface. A red arrow points to the 'Progress' tab from the 'In-Rotator' tab. The interface includes a navigation bar with tabs: Onboarding, Advancement, In-Rotator, Checklists, Notifications, People, Steps, Progress, Incomplete, and Contracts. Below the navigation bar, there is a section titled 'Choose a checklist to view completion progress.' with a dropdown menu showing '14/15 Onboarding Checklist (Family Medicine)'. Below this, there is a section titled '14/15 Onboarding Checklist' with the instruction 'Please read instruction of each step'. Below this, there is a section titled 'Click names to view individual checklists. Select rows to update due dates, delete checklists or send an email reminder.' with a table of checklist items.

<input type="checkbox"/>	Person	Program
<input type="checkbox"/>	Martinez, Maria **	Emergency Medicine
<input type="checkbox"/>	Radovik, Matt	Family Medicine!
<input type="checkbox"/>	Rapaski, Sheryl	Family Medicine!

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Create a Notification

1. Go to Personnel > Checklists > Onboarding (or Advancement or Rotation)
2. Click the Notifications tab
3. Click Add Notification

The screenshot shows the 'Manage Checklists' interface. At the top, there are tabs for 'Onboarding', 'Advancement', and 'In-Rotator'. Below these, there are sub-tabs for 'Checklists', 'Notifications', 'People', 'Steps', 'Progress', and 'Incomplete'. The 'Notifications' sub-tab is selected. Below the sub-tabs, there is a text input field for 'Title' and a 'Type' dropdown menu. The 'Add Notification' button is highlighted. Below the input fields, there is a table with columns for 'Title', 'Type', and 'Initial'. The table contains one row with the title 'Initial Notification' and type 'Initial'.

Initial

1. Enter a name for the email
2. Select Initial
3. Select the checklist that this email should apply to
4. Enter text or use default subject line
5. Type in the body of the message. Use the "insert field" list to automatically insert information
6. Click Save

Note: If you have already distributed your checklist and then make edits to the notification, the recipients will not see the edits. They will get the original notification text.

The screenshot shows the 'Checklist Notifications' form. It has a 'Title' field with the value 'Initial Notification'. Below it is a 'Type' dropdown menu with 'Initial' selected. There is a note: 'Sent to recipients the day after a checklist is distributed to them'. Below this is a section 'Apply notification to selected checklists' with a list of checkboxes and a dropdown menu. The dropdown menu is open, showing a list of checklists: 'Incoming Resident Checklist', 'Incoming Resident Checklist for EM', 'Incoming Residents', 'Incoming Trainee Checklist', and 'Instructions'. Below this is a 'Subject' field with the value 'Please Complete Your Checklist'. There is an 'Insert Field' button and a dropdown menu. Below this is a 'Message' field with a text area containing the following text: 'Dear (Recipient First Name),', 'Please access your (Checklist Name) checklist at @NewInnovations and complete all tasks by (Checklist Due Date).', and 'Please contact (Coordinator Name) at (Coordinator Email) for questions and log in'. At the bottom, there are 'Save' and 'Cancel' buttons.

Reminder

1. Enter a name for the email
2. Select Reminder
3. Select the checklist that this email should apply to
4. Select how many days prior to the due date the reminder should be sent. If no number is entered, the reminder will be sent on the Due Date.
5. To have the reminder sent on a regular basis, enter how often the reminder should be sent
6. Check boxes to have cc's of the reminder email sent to the Programs Director and Program Coordinator
7. Enter text or use default subject line
8. Type in the body of the message. Use the "insert field" list to automatically insert information
9. Click Save

The screenshot shows a web form titled "Checklist Notifications". It has several sections: "Title" with a text box containing "Initial Notification"; "Type" with a dropdown menu set to "Reminder" and a note "Sent to recipients with incomplete steps remaining on their checklist"; "Apply notification to selected checklists" with a list of checkboxes for "Onboarding", "Onboarding Checklist", "Onboarding JDK", "Pre-Employment Checklist", and "Sharing Checklists and Steps Test"; "Send Options" with "Sent" set to 7 days prior to due date and "Send every" set to 3 days; "CC Options" with checkboxes for "Program Coordinator" and "Program Director"; "Subject" with a text box containing "Reminder to Complete Your Checklist"; and "Message" with a text area containing a template email body: "Dear (Recipient First Name), The following items on your (Checklist Name) checklist are incomplete: (Incomplete Items List)". There is also an "Insert Field" button and a "Remaining Characters: 4,678" indicator. At the bottom are "Save" and "Cancel" buttons.

Notes: This notice includes a field for incomplete steps. Steps that the resident cannot mark as complete or that need an additional review and are in the pending status are still sent in the email as an incomplete step.

Setting the send date to 0 days prior to the due date' schedules the reminder to be sent on the due date. However, the email will be sent the following day because the reminder emails are queued up and sent in the morning. This means that while the reminder is set for the due date, the email will be sent the following morning.

Complete

1. Enter a name for the email
2. Select Complete
3. Select the checklist that this email should apply to
4. Enter text or use default subject line
5. Type in the body of the message. Use the “insert field” list to automatically insert information
6. Click Save

The screenshot shows a web form titled "Checklist Notifications". It contains the following fields and controls:

- Title:** A text box containing "Default Complete Notification".
- Type:** A dropdown menu set to "Complete". A tooltip below it reads "Sent to recipients the day after all checklist steps are completed".
- Apply notification to selected checklists:** A section with links "All | None | Invert | Checklists". Below is a tree view of checklists:
 - ▲ New Trainees
 - On Hold checklist
 - ▼ Onboarding
 - Onboarding Checklist
 - OnBoarding JDK
- Subject:** A text box containing "Checklist Complete".
- Message:** A large text area containing the following text:

Dear [Recipient First Name],

Congratulations! You have successfully completed all tasks on your [Checklist Name] checklist.

Please contact [Coordinator Name] at [Coordinator Email] if you have any questions.

Remaining Characters: 4,785
- Insert Field:** A dropdown menu next to the message text area.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

Administrative

1. Enter a name for the email
2. Select Administrative
3. Select the checklist the email should apply to
4. Select the duration that you'd like to receive the email
 1. Daily while the checklist is active
 2. Or select a date range
5. Choose to have other L5 or L6 administrators included on the email by selecting their names from the Administrator list. Administrators need a primary email address to appear in this list.
6. Click Save

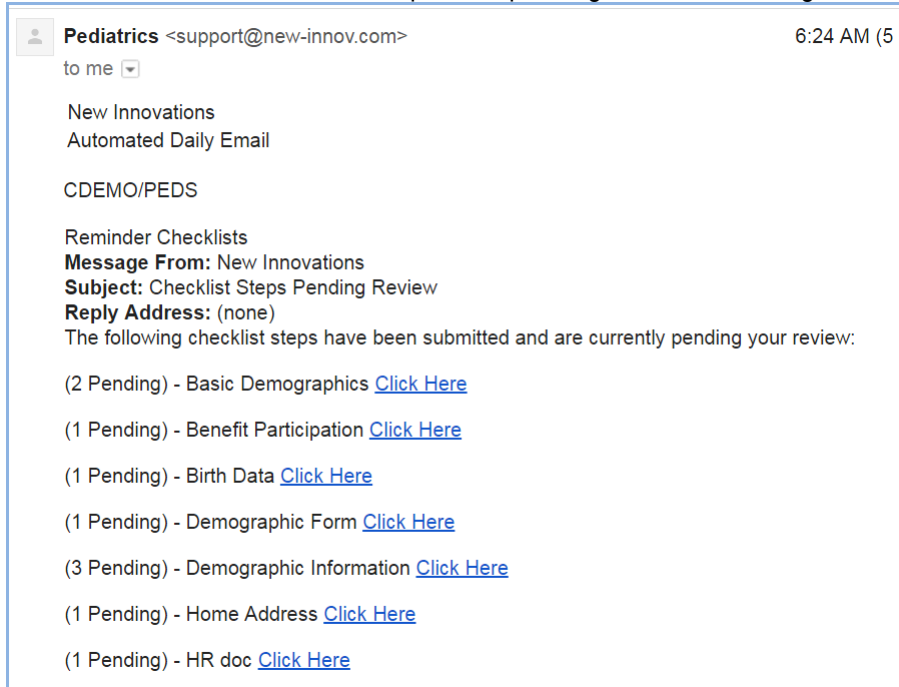
The screenshot shows the 'Checklist Notifications' dialog box. The 'Title' field is 'Default Administrative Notification'. The 'Type' is 'Administrative'. The 'Apply notification to selected checklists' section has a list with 'New Residents', 'New Residents and Fellows', 'New Trainees', 'On Hold checklist', and 'Onboarding'. The 'Duration' section has two radio buttons: 'Daily while active checklists exist' (selected) and 'Date Range'. The 'Recipients' section has three columns: 'Administrators' (with a list of names including Adams, Patricia; Andrews, Florence; Bayle, Judith; Beckert, Debbie; Beebe, Elizabeth; Benson, Wayne), 'Include recipient's' (with checkboxes for Program Coordinator, Program Director, Associate Program Director, and Program Chair), and 'Additional email addresses' (with a text area and a note to separate multiple addresses with a semi-colon). At the bottom are 'Save' and 'Cancel' buttons.

Pending

1. Enter a name for the email
2. Select Pending
3. Select the checklist the email should apply to
4. Select the duration that you'd like to receive the email
 1. Daily while the checklist is active
 2. Select a date range
5. Select or add in email addresses of people to receive this email
6. Click Save
 1. Enter a name for the email
 2. Select Administrative
 3. Select the checklist the email should apply to
 4. Select the duration that you'd like to receive the email
 1. Daily while the checklist is active
 2. Select a date range

5. Select or add in email addresses of people to receive this email
6. Click Save

The email contains a link to the step that is pending. Click the link to go to the step.



Step Returned to Recipient

Automated: No set up required

The recipient receives an email when a step is returned. The email contains the name of the step and any notes the administrator added to the step.

The recipient receives only one (returned step) notice in their consolidated email the day after the step is returned. When the step is returned, it is marked 'To Do' on the checklist, which indicates that the checklist is now not complete. If you have Reminder Emails configured, the recipient will begin to receive a notice that the checklist is incomplete. Those notices will continue on the schedule configured in the reminder notice setup until the resident completes the returned step.

Checklists - Additional Reviewers

An additional reviewer is someone who can have access to a step on a checklist to review the information in the step. For example, a person in Human Resources may be granted access to view an insurance document that a new hire has uploaded to their onboarding checklist.

The additional reviewer should have a profile in the software with Level 1 privileges in Personnel. L1 allows the person to see steps with Additional Reviewers configured.

Steps for the additional reviewer to get to Checklists

Log in to New Innovations:

1. Go to www.new-innov.com
2. Click on Client Login
3. Enter your institution login, username and password (this is given to you by your NI administrator)

To review checklist information:

1. Go to My Profile on the blue menu bar at the top of the page in New Innovations
2. Click on the type of checklist link (Ex. You are an additional reviewer for an Onboarding checklist. Click on Onboarding)
3. You may choose to view information by People or Step
4. Select the person or step from the dropdown list
5. The blue 'P' indicates the step has information provided by the checklist recipient
6. Open the attached information and print or download to the appropriate area on your computer

Approving Checklist Steps

People Tab

Select a recipient and check their progress completing the tasks assigned to them.

Tags on the page are:

- Pending: A document has been submitted for administrator review.
- To Do: The recipient has yet to complete this task
- Complete: The recipient or administrator has completed this task. DO NOT complete a step unless instructed to do so.
- Return Step: Return the step to the recipient for further action
- Overdue: The checklist due date has passed and the step is not complete

Approving Documents by People

1. Click People
2. Uncheck "Completed" and "Incomplete" so that only Pending steps are displayed on the page
3. Select a person with a Pending icon
4. Click the document to open and review it.
5. Check the box to approve the submission
6. Once approved, documents are stored in the Files & Notes area (as determined in the checklist) in the recipient's Personnel Data file
7. You can return a document to the recipient if it is not complete or the correct document
8. Click Return Step and add a note to explain why it is being returned

Steps Tab

You can review progress by checklist step on the Steps tab. You can narrow the list of steps you see to steps from certain checklists by clicking the filter icon to the left of the dropdown list.

Approving Documents by Step

1. Click Steps
2. Uncheck "Completed" and "Incomplete" so that only pending steps will show up on the page
3. Select a step with a Pending icon
4. Click the document to open and review it.

5. Check the box to approve the submission
6. Once approved, documents are stored in the Files & Notes area (as determined in the checklist) in the recipient's Personnel Data file
7. You can return a document to the recipient if it is not complete or the correct document
8. Click Return Document and add a note to explain why it is being returned

Add or Copy Existing Steps

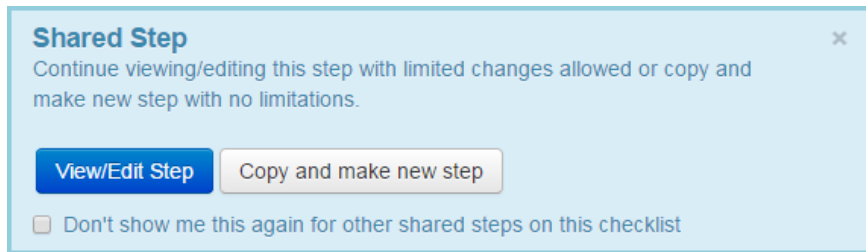
You can add steps you've already created or that someone else has created by using the Add Existing Steps option.

1. Click **Add Existing Step**
2. Select existing steps from your department or click 'All' to view steps from all departments
3. The list displays the name of the department that created the step, the name, instructions and the type of step.

The screenshot shows a web interface for selecting existing steps. At the top, there is a 'View' dropdown set to 'All' and a 'Steps' label. A search bar is also present. Below this is a header bar with the text 'Select an existing step to add to list or archive old steps' and a checkbox for 'Include Archived'. The main content area is a scrollable list of steps, all from 'Yoda's GME Dept'.

Department	Step Name	Instructions	Step Type
Yoda's GME Dept	1.Instruction Step (Dependent on Contract Step)	<i>I've got some instructions here for the resident to follow when they complete this checklist</i>	No Information Exchange
Yoda's GME Dept	1.Policy Step		Provides policies for resident
Yoda's GME Dept	1.Text Box/Conditions (must be in Yoda's IM Prog)		Has Conditions Requests text response
Yoda's GME Dept	111 File Download Step		Requires file upload Provides a file
Yoda's GME Dept	111 File Upload		Requires file upload Provides a file

1. Click on the step to add it to your checklist
2. Click **View/Edit Step** to see detail



Click on the blue bar labeled 'Shared from another department. Limited changes allowed' to see where the step is used and the changes that can be made

If you want to use the step as is, you don't have to do anything further

- However if you want to make edits, click **Copy** and make new step. This will make a new step that can be edited. The copied question now belongs to your department and is not associated with the original question and department so it won't affect historical data
- Or you could skip the View/Edit Step button and click **Copy** to make a new step

Checklists - Tabs

Once checklists have been distributed, administrators can see the recipient's progress completing the checklist, send reminders, view documents, and mark steps as complete. Steps can be marked complete by:

- Level 6 Users: mark any step complete, any time
- Level 5 Users: mark steps complete for people that belong to their department, unless prevented from doing so by a level 6 user
- Recipients: mark steps complete on their own checklists, unless prevented by an administrator
- Reviewers: mark steps complete when they are identified as reviewers

Advance a Person if Checklist is Not Completed

A checklist can be configured to prevent a person from advancing to the next status in their program if the checklist is not complete by their advancement date. Use the Sync for Advancement option in the person's training record to manually advance a person even though the checklist is not complete. The following actions may take place depending on the person's training record information:

- If a resident should change department, a "legacy department" record is created in the previous department
- The program start and end date will be updated in the demographic record
- Updates program if it changes
- Updates program track if it changes
- Updates PGY
- Updates status
- Updates status definition (based on training record)
- Updates work roles if necessary
- Archives the record if needed

Manage Checklists

For more information about Checklists go to [Help>Tutorial Videos>\[3.10\] Personnel-Manage Checklists](#)

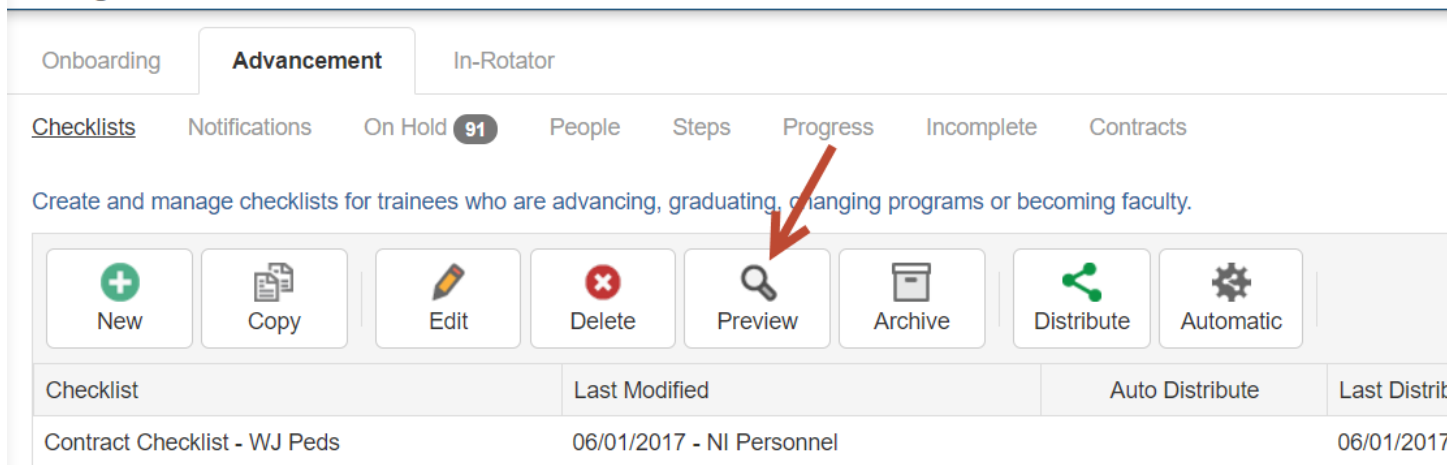
1. To manage your checklists, go to **Personnel** > find the Checklists heading and click **Onboarding**, **Advancement**, or **Rotation**
2. You'll see these "tabs:"
 - Checklists
 - Notifications
 - On Hold
 - People
 - Steps
 - Progress
 - Incomplete
 - Contracts

Checklists Tab

Preview a Checklist - View how your checklist will appear to recipients.

1. Select your checklist
2. Click Preview

Manage Checklists



The screenshot shows the 'Manage Checklists' interface. At the top, there are three main tabs: 'Onboarding', 'Advancement' (which is selected), and 'In-Rotator'. Under the 'Advancement' tab, there are several sub-tabs: 'Checklists' (selected), 'Notifications', 'On Hold' (with a badge showing '91'), 'People', 'Steps', 'Progress', 'Incomplete', and 'Contracts'. Below the sub-tabs, there is a description: 'Create and manage checklists for trainees who are advancing, graduating, changing programs or becoming faculty.' Below this is a row of action buttons: 'New' (green plus icon), 'Copy' (document icon), 'Edit' (pencil icon), 'Delete' (red X icon), 'Preview' (magnifying glass icon, highlighted with a red arrow), 'Archive' (box icon), 'Distribute' (share icon), and 'Automatic' (gear icon). At the bottom, there is a table with columns: 'Checklist', 'Last Modified', 'Auto Distribute', and 'Last Distrib'. The first row of the table shows 'Contract Checklist - WJ Peds', '06/01/2017 - NI Personnel', and '06/01/2017'.

Checklist	Last Modified	Auto Distribute	Last Distrib
Contract Checklist - WJ Peds	06/01/2017 - NI Personnel		06/01/2017

On Hold Tab

On Hold 1

If you see a number here, that many checklists have **not** been distributed.

These checklists are either:

- Ready to be reviewed and released
 - Because either:*
 - They have a contract step
 - Or during distribution, "place on hold" was selected
- Or they need issues corrected before releasing is possible

Reviewing On Hold Checklists or Contracts

1. Click **On Hold**
2. Select a checklist from the dropdown
3. If the **Issues** column is blank, you can review and release the checklist:
 - A. Click **View** to see the checklist steps
 - B. Click **Download Contract** to download the file and look it over
 - C. If it looks good, you can click **Release**
4. If the **Issues** column describes an issue, you must correct it before you're able to release the checklist
 - A. If these issues don't appear but you still can't distribute, try checking your start/end date for the learner and program—an easy mix-up
5. See if your checklist is now ready to distribute:
 - A. Click **Actions** on the checklist
 - B. Click **Rebuild Contract**
 - C. You may see "Contract Merge In-Process" on the checklist. Refresh your browser
 - D. Click **Actions** again
 - If you see **Release**, your checklist is ready to send
 - If you see a new issue described in the Issues column, repeat from step 4
 - E. Click **Release**. The checklist will send and disappear from your On Hold list

People Tab

Click Filter Programs to limit who you see by program. Select a resident and check their progress completing the tasks assigned to them. You can click Dismiss in the blue message bar. Click the arrow beside the name of the checklist to view all questions.

Onboarding | Advancement | In-Rotator


Checklists | Notifications | On Hold 4 | **People** | Steps | Progress | Incomplete | Contracts

While you were away...

Some changes were made to improve the speed of this page. We're now requiring that each checklist be expanded individually rather than all at once.

Dismiss

Expand a checklist to review the steps.

	<input type="text" value="brigg, jb"/>	Program Start: 7/1/2018	Employer: [None]
Incoming Resident	FM - Family Medicine	Citizenship: [None]	PGY: 1
View Profile		Medical: [None]	Visa: [None]
		School:	Phone: [None]
		Email: [None]	

Checklist
Emergency Medicine Incoming Resident Checklist
>
View Change Log
New Hire Checklist
>
View Change Log

1. Review submitted documents
2. Mark steps complete by putting a check in the box to the left of the step
3. Make a step required or not required by clicking the 'Required' button on or off
4. Return a step to the recipient
5. Delete checklists for individuals by clicking the delete link (L6 only)
6. Waive a checklist to suspend further action by the recipient (L6 only)
7. Send an email to remind the person to complete steps
8. View the recipient's profile by clicking on their picture (or place holder for a picture)

Bulk Printing

All documents attached to selected (filtered) checklists can be printed by clicking on Export All Documents. They will be exported to a zip file so that you can print out specific documents.

Manage Checklists

Onboarding

Advancement

In-Rotator

Checklists

Notifications

On Hold 91

People


Steps

Progress

Incomplete

Contracts

Manage assigned checklists.



Abney, Kenton Orville

▼

PRG 2 *trh-internal-medicine-general*

Program Start: 6/24/2015

Citizenship: Canada

Medical Albany Medical College - School: 03503

Email: ni.testter@yahoo.com

Employer: TRH Employer Hospital

PGY: 2

Visa: Charge Card - Expires: 1234

Phone: (330) 555-1001

(330) 555-1002

Tags on the page are:

- Pending: A document has been submitted for administrator review.
- To Do: The recipient has yet to complete this task
- Complete: The recipient or administrator has completed this task
- Return Step: Return the step to the recipient for further action
- Overdue: The checklist due date has passed and the step is not complete

Approving Documents by People

1. Click People
2. Uncheck "Completed" and "Incomplete" so that only Pending steps will show up on the page
3. Select a person with a Pending icon
4. Click the document to open and review it.
5. Check the box to approve the submission
6. Upon approval, documents are stored in the folder selected in the step
7. You can return a document to the recipient if it is not complete or the correct document
8. Click Return Step and add a note to explain why it is being returned

Manage Checklists

Onboarding

Advancement

In-Rotator

Checklists

Notifications

On Hold 91

People


Steps

Progress

Incomplete

Contracts

Manage assigned checklists.



Abney, Kenton Orville

PRG 2 *trh-internal-medicine-general*

Program Start: 6/24/2015

Citizenship: Canada

Medical Albany Medical College -
School: 03503

Email: ni.testster@yahoo.com

Employer: TRH Employer Hospital

PGY: 2

Visa: Charge Card - Expires:
1234

Phone: (330) 555-1001
(330) 555-1002

Steps Tab

You can review progress by checklist step on the Steps tab. You can narrow the list of steps you see to steps from certain checklists by clicking the filter icon to the left of the drop-down list.

Click Filter Programs to limit what you see by program. Use the view check boxes to see steps that are completed, incomplete, or pending administrative review. The number following "Pending" indicates how many items are pending administrative review and is the default view.

1. Select the step
2. Review submitted documents
3. Mark steps complete by putting a check in the box to the left of the step

Approving Documents by Step

1. Click Steps
2. Uncheck "Completed" and "Incomplete" so that only pending steps will show up on the page
3. Select a step with a Pending icon
4. Click the document to open and review it.
5. Check the box to approve the submission
6. Once approved, documents are stored in the Files & Notes tab in the recipient's Personnel Data file
7. You can return a document to the recipient if it is not complete or the correct document
8. Click Return Document and add a note to explain why it is being returned

Manage Checklists

Onboarding

Advancement

In-Rotator

Checklists

Notifications

On Hold **91**

People

Steps

Progress

Incomplete

Contracts

Manage assigned steps.

Adv Needs Reviewed

Adv Needs Reviewed

Recipient	Due Date	Program	Status	
<input checked="" type="checkbox"/> Barriga, Darcie R PRG 1 TRH IMG Adv CL 20150609	05/15/2017	trh-internal-medicine-general	Due 3/1/2017 COMPLETE Return Step	<div>Pair Testing - The Secret Sauce of Agile Testing - Codemash.pdf file submitted: Feb 13 2017 9:26AM</div> <div>RELEASE - Departments.xlsx file submitted: Feb 13 2017 9:26AM</div>
<input type="checkbox"/> Baskerville, Anderson J PRG 1 TRH IMG Adv CL 20150609	05/15/2017	trh-internal-medicine-general	Due 3/1/2017 PENDING Return Step	<div>bill_host_aspx-pg.txt file submitted: Feb 13 2017 9:26AM</div> <div>bill_host_aspx-pg.xls</div>

Note: Steps that include forms: Once this type of step is marked complete, it cannot be switched back to incomplete because the data has already been committed to Personnel.

Bulk Printing

All documents attached to a step can be printed by clicking on Export All Documents. They will be exported to a zip file so that you can print out specific documents.

Manage Checklists

Onboarding

Advancement

In-Rotator

Checklists

Notifications

On Hold 91

People

Steps

Progress

Incomplete

Contracts

Manage assigned steps.

Completed

Incomplete

Adv Needs Reviewed

▼

Adv Needs Reviewed

Recipient	Due Date	Program	Status	
<input checked="" type="checkbox"/> Barriga, Darcie R PRG 1 TRH IMG Adv CL 20150609	05/15/2017	trh-internal-medicine-general	Due 3/1/2017 COMPLETE Return Step	<div>Pair Testing - The Secret Sauce of Agile Testing - Codemash.pdf file submitted: Feb 13 2017 9:26AM</div> <div>RELEASE - Departments.xlsx file submitted: Feb 13 2017 9:26AM</div>
<input type="checkbox"/> Baskerville, Anderson J PRG 1 TRH IMG Adv CL 20150609	05/15/2017	trh-internal-medicine-general	Due 3/1/2017 PENDING Return Step	<div>bill_host_aspx-pg.txt file submitted: Feb 13 2017 9:26AM</div> <div>bill_host_aspx-pg.xls</div>

Progress Tab

Use the Progress Tab to see a summary of how everyone is progressing on their checklists. The page can be sorted to view the following groups: people, steps, completed, incomplete or archived checklists. You can also use this page to archive or delete a person's checklist when they are no longer needed. You can take the following actions on this page:

1. View the overall summary of progress for each checklist you have distributed
2. Click a person's name to access his or her checklist
3. Click and drag to select multiple rows
4. Check the box in front of a person and select one of the following actions:
 - Delete - Deletes the selected person's checklist
 - Archive - Archives the selected person's checklist
 - Unarchive - Unarchives the selected person's checklist
 - Update Due Dates - Changes the due dates for selected person's checklists
 - Sync for Advancement - When a recipient has not completed a checklist that is required for advancement, use this tool to advance the persons demographic record to the correct status. The record is updated immediately.
 - Send Initial Email - Sends the initial email you have configured for this person's checklist
 - Send Reminder Email - Sends the reminder email you have configured for this person's checklist
 - Send Completion Email - Sends the completion notice that you have configured for this person's checklist
 - Send Custom Email - Opens an email from your email program so that you can create a custom message and send it to this person. [Click here for instructions to configure your browser's email.](#)

Manage Checklists

Onboarding

Advancement

In-Rotator

Checklists

Notifications

On Hold 91

People

Steps

Progress

Incomplete

Contracts

Choose a checklist to view completion progress.

Checklist

TRH GME Advancement - Contract With Dupe Sig Tags (▼)

TRH GME Advancement - Contract With Dupe Sig Tags

Click names to view individual checklists. Select rows to update due dates, delete checklists or send an email reminder.

<input type="checkbox"/>	Person	Program
<input type="checkbox"/>	Abney, Kenton Orville	trh-internal-medicine-general
<input type="checkbox"/>	Ahmed, Matthew	trh-surgery-general

Incomplete Tab

View people with incomplete steps and group by People or Steps. You can filter the list by Checklist and Program.

Checklists Reports

Onboarding

Advancement

In-Rotator

Checklists

Notifications

On Hold 91

People

Steps

Progress

Incomplete

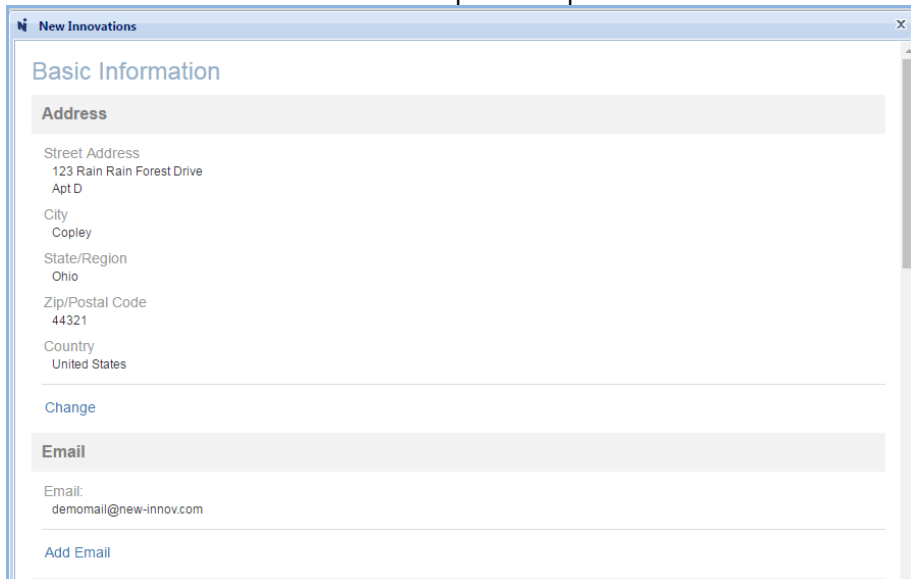
Contracts

All incomplete steps

	Step	Checklist
▼ A, Guy	Program : Nick Prog	
	FirstOne	First Checklist
	SecondOne	First Checklist
	Step 01	Advancement Checklist

Forms

Forms can be viewed on either the Steps or People tabs.



The screenshot shows a web form titled "New Innovations" with a close button (X) in the top right corner. The form is divided into two main sections: "Basic Information" and "Email".

Basic Information

Address

Street Address
123 Rain Rain Forest Drive
Apt D

City
Copley

State/Region
Ohio

Zip/Postal Code
44321

Country
United States

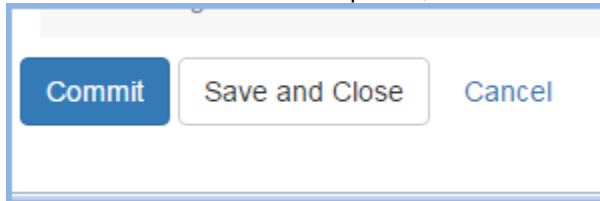
[Change](#)

Email

Email:
demomail@new-innov.com

[Add Email](#)

When the form has been completed, click Commit to add the information to the person's Personnel record.



The screenshot shows the bottom of the form with three buttons: "Commit" (a solid blue button), "Save and Close" (a white button with a blue border), and "Cancel" (a blue text link).

Archive/Unarchive a Checklist

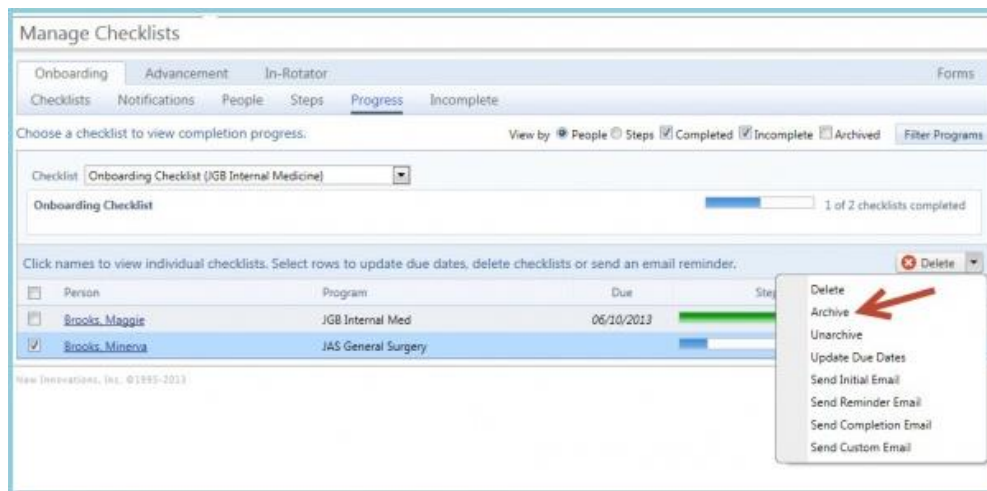
When you archive a checklist, you will be asked whether you want to also archive the distributed checklist or not.

If you elect not to archive the distribution, archiving it will only remove it from the default view for administrators, however, it will still appear for recipients to complete.

If you choose to archive it also for recipients, it will be removed from the default view for administrators and it will no longer be available for recipients to complete. Once archived for recipients, if the checklist is subsequently un-archived, it will not automatically be redistributed to those who formerly had it. You will need to manually redistribute it to those residents.

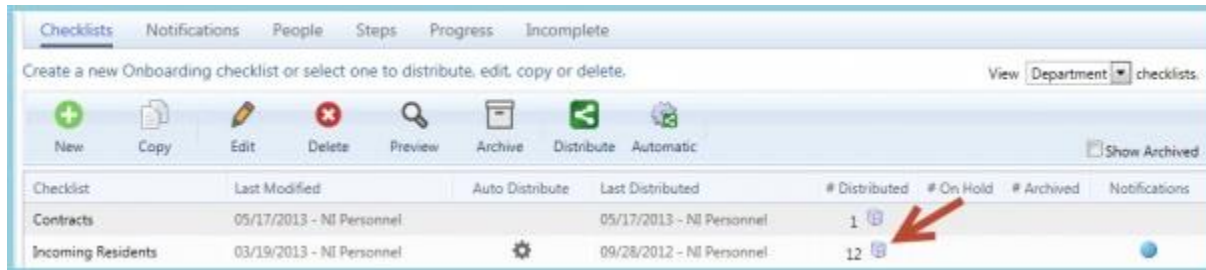
Archive a Person's Checklist

1. Go to Personnel > Onboarding
2. Click the Progress tab
3. Select your checklist
4. Check the box in front of the appropriate person
5. Click the small arrow beside Delete
6. Click **Archive**



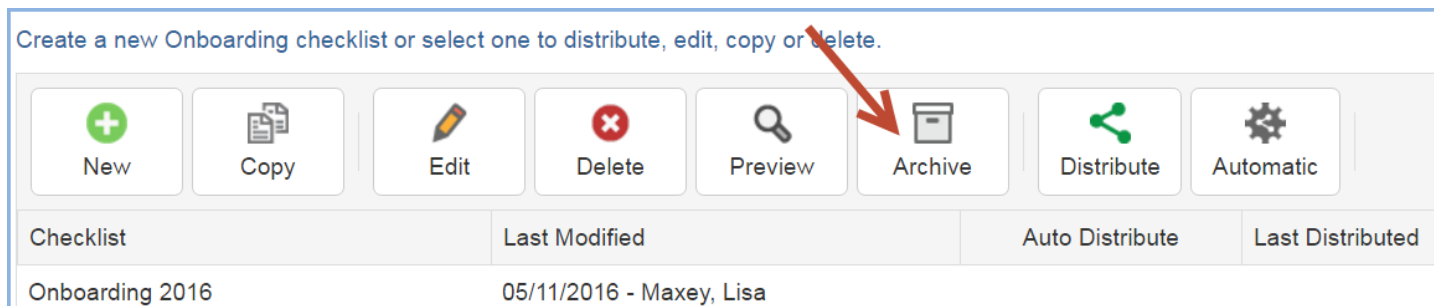
Archive Distributed Checklists en Masse

1. Go to Personnel > Onboarding
2. Click the Checklists tab
3. Click the small folder beside the number in the Distributed column
4. Click **OK**



Archive an Entire Checklist

1. Go to Personnel > Onboarding
 2. Click the Checklists tab
 3. Select the checklist you want to archive
 4. Click the Archive icon
 5. The pop-up box will display 'Would you also like to archive all distributed checklists?' Select one of the following:
- Yes, archive them all.
 - No thanks
 - Cancel



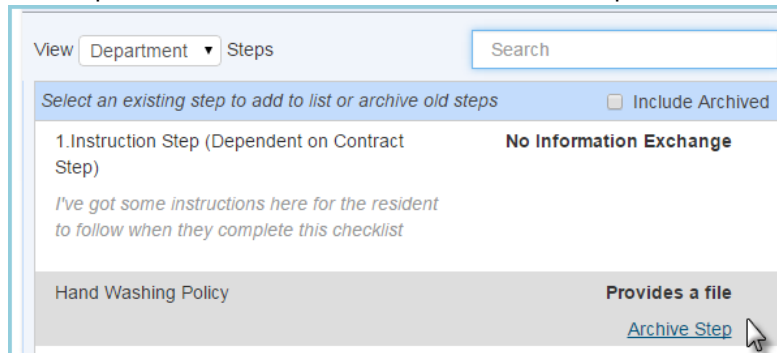
Unarchive a Checklist

1. Check the Show Archived box in the View filters.
2. Select the checklist. The Archive box on the task bar becomes Unarchive
3. Click the **Unarchive box**

Archive a Step

You can archive steps for any department where you have Level 5 privileges in Personnel. Level 6 users can archive any steps in the database.

1. Click **Add Existing Step**
2. Hover over the step to display the Archive Step link
3. Click the link to **Archive Step**
4. To view archived steps, check the 'Include Archived' box at the top of the list



View | Department ▾ | Steps | Search

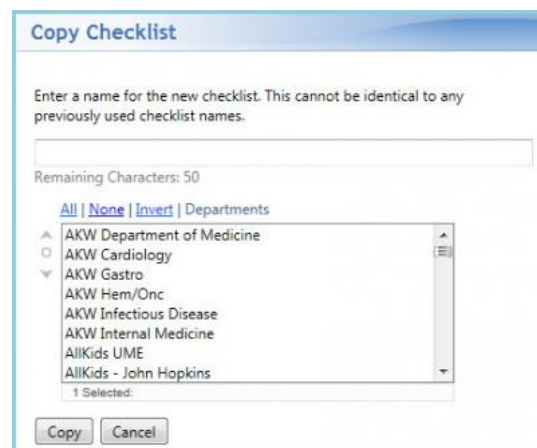
Select an existing step to add to list or archive old steps ☐ Include Archived

1. Instruction Step (Dependent on Contract Step)	No Information Exchange
<i>I've got some instructions here for the resident to follow when they complete this checklist</i>	
Hand Washing Policy	Provides a file
	Archive Step

Copy a Checklist

Copy a Checklist - Copy a checklist to your own program or to another department

1. Select a checklist
2. Click the **Copy** icon
3. Enter a name. Duplicate names cannot be used
4. Select the Department where the copy should go
5. The type of checklist can be changed when you copy.
6. Click **Copy**



Copy Checklist

Enter a name for the new checklist. This cannot be identical to any previously used checklist names.

Remaining Characters: 50

[All](#) | [None](#) | [Invert](#) | Departments

- AKW Department of Medicine
- AKW Cardiology
- AKW Gastro
- AKW Hem/Onc
- AKW Infectious Disease
- AKW Internal Medicine
- AIKKids UME
- AIKKids - John Hopkins

1 Selected:

Steps

Steps are copied to the new form. They are copied with all existing limitations and conditions. To break the connection with the existing question, click Copy and make new step.

Shared Step

Continue viewing/editing this step with limited changes allowed or copy and make new step with no limitations.

[View/Edit Step](#) [Copy and make new step](#)

☐ Don't show me this again for other shared steps on this checklist

Delete a Checklist

Checklists cannot be deleted if they:

- have been **distributed**
- are **on hold**
- or **archived**.

1. Go to *Personnel > Checklists > Onboarding, Advancement or Rotation*
2. Click on the name of the checklist to highlight it
3. Click the **Delete** icon at the top of the list

Manage Checklists

Onboarding Advancement In-Rotator

Checklists Notifications People Steps Progress Incomplete Contracts

Create a new Onboarding checklist or select one to distribute, edit, copy or delete.

New

Copy

Edit

Delete

Preview

Archive

Distribute

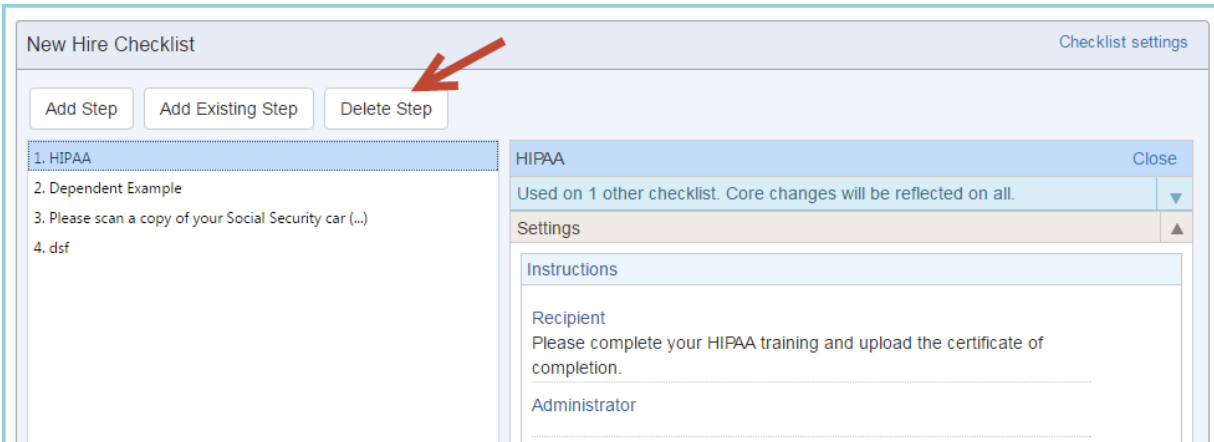
Automatic

Checklist	Last Modified	Auto Distribute	Last Distributed	# D
New Hire Checklist	09/28/2015 - NI Personnel		03/01/2016 - NI Personnel	
Test	04/01/2016 - NI Personnel			

4. Click **OK** in the pop up

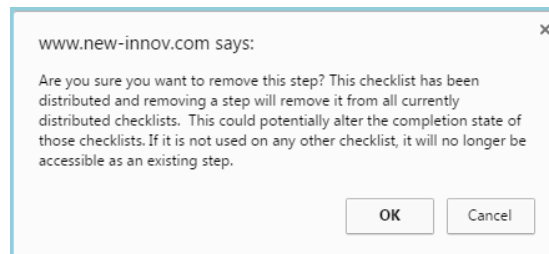
Delete a Step

Steps can be deleted from a form at any time. Even if the form has been distributed and people have completed the step, the step is **deleted** as well as any documents that have been uploaded with the step. This is the warning displayed when you click Delete:



The screenshot shows the 'New Hire Checklist' interface. At the top, there are three buttons: 'Add Step', 'Add Existing Step', and 'Delete Step'. A red arrow points to the 'Delete Step' button. Below the buttons is a list of steps: '1. HIPAA', '2. Dependent Example', '3. Please scan a copy of your Social Security card (...)', and '4. dsf'. The 'HIPAA' step is selected. To the right of the list, there is a detailed view of the 'HIPAA' step, including a 'Close' button, a status bar indicating it is used on 1 other checklist, and a 'Settings' section with 'Instructions' for the 'Recipient' and 'Administrator'.

1. Go to *Personnel > Checklists > Onboarding, Advancement or Rotation*
2. Click on the checklist name to highlight it
3. Click **Edit**
4. Click on the step and select **Delete Step** from the choices at the top of the list
5. Click **OK** to the popup



A warning dialog box from www.new-innov.com. The text inside reads: 'Are you sure you want to remove this step? This checklist has been distributed and removing a step will remove it from all currently distributed checklists. This could potentially alter the completion state of those checklists. If it is not used on any other checklist, it will no longer be accessible as an existing step.' At the bottom, there are two buttons: 'OK' and 'Cancel'.

Edit a Step

Once a step has been distributed to recipients, it can no longer be edited, except for the following details:

- Name
- Instructions
- Whether the recipient can mark it as complete
- If it is for Administrator use only
- Replace a file you had provided via Information Exchange
- Additional Reviewers
- Conditional Recipients
- Dependent Steps

Should you need to change other aspects of the step, you will need to delete the step and add a new one to replace it. Deleting the step will remove it from any distributed checklist, whether the step or the checklist was completed or not. If the step required entry of information or an uploaded document from the recipient, it will be lost when deleted.

Adding a new step to a distributed checklist, automatically adds it to all existing recipients, even if the checklist was marked as completed.

1. Go to Personnel > Checklists > Onboarding, Advancement or Rotation
2. Click on the Checklist name to highlight it
3. Click on Edit
4. Make edits
5. Click Close at the top of the step