

Onboarding Module Training Outline

Section	Page	Recommended Webinar
Intro to Checklists	4	
Access	4	
Creating Checklists Add a new step <ul style="list-style-type: none"> • Add a Hyperlink • Information Exchange • Conditional Recipients • Dependent Steps • Additional Reviewers 	4-9	Help>Tutorial Videos>[3.09] Personnel-Create Check Help>Tutorial Videos>[3.11] Personnel-Onboarding for Additional Reviewers
Manage Steps <ul style="list-style-type: none"> • Edit the name of a step • Remove steps 	10	
Checklist Forms <ul style="list-style-type: none"> • Transferring checklist form data to Personnel Profile • Create a Form • Add a form to a checklist 	11-14	Help>Tutorial Videos>[3.14] Personnel-Checklist Forms
Distributing Checklists <ul style="list-style-type: none"> • Criteria for Potential Recipients • Distribution by Checklist Type 	15-22	Help>Tutorial Videos>[3.12] Personnel-Checklist Distribution
Checklist Notifications Types of notifications: <ul style="list-style-type: none"> • Initial • Reminder • Complete • Administrative • Pending 	23-28	Help>Tutorial Videos>[3.13] Personnel-Checklist Notifications
Step Returned to Recipient	29	
Checklist- Additional Reviewers	29	
Approving Checklists Steps-Actions <ul style="list-style-type: none"> • People Tab • Steps Tab 	30-31	
Adding or Copy Existing Steps <ul style="list-style-type: none"> • Advance a Person if Checklist is not Completed 	31-32	
Managing Checklists <ul style="list-style-type: none"> • Checklists Tab • On Hold Tab • People Tab • Steps Tab • Progress Tab • Incomplete Tab • Forms • Bulk Printing 	33-41	Help>Tutorial Videos>[3.10] Personnel-Manage Checklists
Archive/Unarchive a Checklist	42-44	

<ul style="list-style-type: none"> • Archive a Person's Checklist • Archive Distributed Checklists en Masse • Archive an entire checklist • Unarchive a checklist • Archive a step 		
Copy a Checklist	44-45	
Delete a Checklist <ul style="list-style-type: none"> • Delete a Step • Edit a Step 	46-47	