

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

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