



Using a Checklist Overview

Cardinal Checklist functionality is used across the Commonwealth to track and audit tasks when entering a New Hire, a Leave of Absence, and a Termination on an employee's Cardinal Job Record. The checklist enables audit departments to confirm when tasks are completed and recorded in Cardinal HCM.

When the user selects a Checklist, the Checklist items populate, allowing the user to "record" a change in status per item when the task has been initiated, completed, notified, and/or received.

COVHIR – Hire

When completing a new hire, use the New Hire Checklist to validate tasks are completed during the new employee onboarding.

COVLOA – Leave of Absence

When putting an employee on Leave of Absence, use the Leave of Absence Checklist to validate tasks are completed when entering a Leave of Absence on the employee's job record.

COVTER – Terminate

When completing a termination, use the Terminate Checklist to validate tasks are completed when entering a Termination on the employee's job record.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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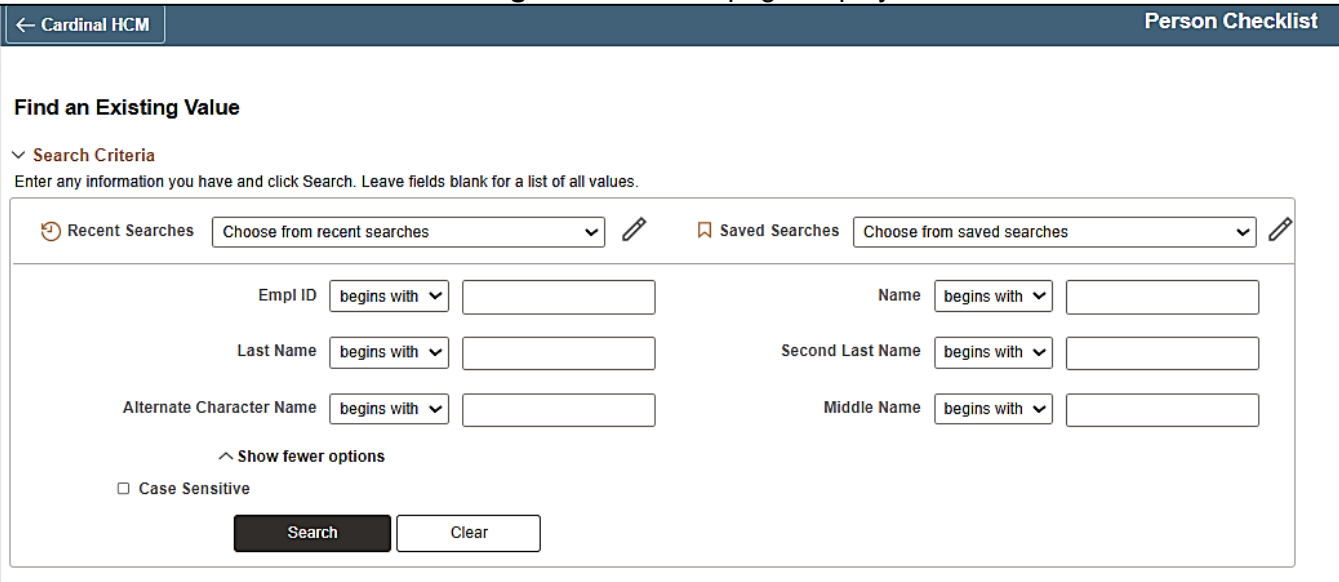


Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Updated the screenshots of the Search pages (Section 1 ; after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Accessing a Checklist

This overview uses the New Hire Checklist as an example. When completing a new hire, access and use the New Hire Checklist to validate tasks are completed prior to the new employee's start date. Refer to Agency guidelines when using this checklist.

Step	Action
1.	Navigate to the Person Checklist page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > Person Checklist The Person Checklist Find an Existing Value Search page displays. 
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
2.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. 

Step	Action
3.	Click the Search button.



If multiple employees match the search criteria entered, the search results display in the bottom portion of the page. Select the applicable employee by clicking the **Drill In** icon for the corresponding row.

The **Person Checklist** page displays for the selected employee with the applicable tasks.

Note: The example below is a new hire checklist.

Mickey Mouse
Person ID

Checklist History
1 of 1
View All

*Checklist Date 06/08/2026
+
-

*Checklist COVHIR
Hire

Comment

Person Checklist Items
1-28 of 28

*Sequence	*Item Code	Description	*Status	Link ID
100	VA_HIR	Hired into Cardinal	Initiated	
150	HIR190	Transfer from other Agency?	Initiated	
200	HIR200	CHRC Background (If Appl)	Initiated	
300	HIR210	Request Security Access	Initiated	
400	HIR220	ID Badge	Initiated	
500	HIR230	SSN Verified	Initiated	

4. The **Checklist Date** field defaults to the current system date. Update as needed using the **Calendar** icon.

*Checklist Date 06/08/2026



Step	Action
5.	Select the applicable Checklist using the Checklist Look up icon. Note: For this example, the Checklist default of "COVHIR" is applicable. *Checklist COVHIR Q

The **Person Checklist** page refreshes.

Mickey Mouse

Person ID

Checklist History

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1 of 1

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View All

*Checklist Date

06/08/2026

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*Checklist

COVHIR

Q

Hire

Comment

Person Checklist Items

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1-28 of 28

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Step	Action
6.	The Status field defaults to “Initiated”. Click the corresponding Status drop-down button and select the applicable status (i.e., “Completed”, “Initiated”, “Notified”, or “Received”) to update individual tasks. 
7.	Click the Save button. 
	All checklist items should have a status of “Completed” for the Checklist to be considered complete and valid.