

How to use the offboarding checklist editor

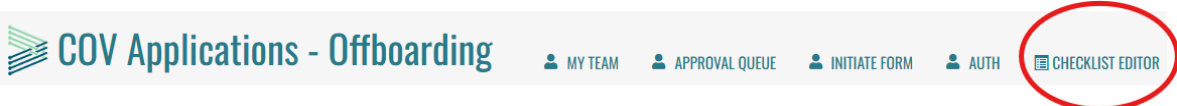
Purpose

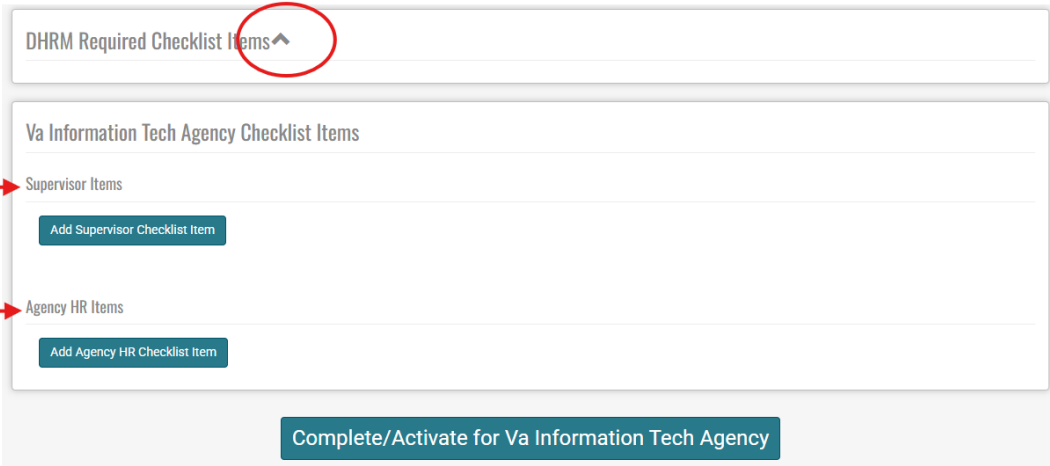
This job aid demonstrates how to use the offboarding checklist editor if assigned that role by the agency administrator.

Responsibility

All Commonwealth of Virginia (COV) employees who are assigned the checklist editor role.

Procedures

1.	If you have been given the role of checklist editor for the offboarding application by your agency administrator, you will see the checklist editor tab on the top right of the Offboarding Application.  Reminder: the default checklist may be all your agency requires; however, you still must mark the list "Complete/Activate" to make it available and ready to use. See step 8.
2.	Click the Checklist Editor tab
3.	You will see two panels: • DHRM required checklist items - Click on the caret (^) to expand the list to confirm if your agency requires additional, agency-specific checklist items for either supervisors or agency human resources (HR). • Agency checklist items - provides the ability to add supervisor and agency HR items for the agency's checklist.

	
4.	To add any checklist item, find the checklist you want to add to and select the Add button just below.
5.	A window will appear.
6.	Fill in the checklist item and the response option(s). For example, the responses may be Yes, No, Not Applicable .
7.	Selecting Save , saves the checklist item to draft. Selecting Cancel will return you to the previous page with no changes saved.
8.	CAUTION: Do not select the Complete/Activate button until your agency's checklist is final. You will not be able to change or edit the list once this button is selected.
9.	After the Complete/Activate button is selected, the lists are published for your agency and are ready to use.