How do I? Manage Checklists

Version 9.0

View Checklists

1. **Click on Campus Community**
2. **Click on Checklists**
3. **Click on Person Checklists**
4. **Click on Checklist Management - Person**
5. **Enter the Student ID number**
6. **Click on Search** Search.
7. **Click on the appropriate link from the search results.** (If necessary)
8. If the Function is STRM **click** on **Variable Data** to view the term information.
9. **Click on Checklist Management2** to view the checklist items.

NOTES:

Checklist or Item Status
Initiated – Student stills needs to complete item or checklist
Waived – Not required for this student.
Completed – Student has completed the checklist or item

If the Checklist is setup to appear in the Student Center it will appear as a To Do. The status must be set to Waived or Completed to be removed from the To Do list.

Add a Checklist

1. **Same Navigation as View Checklists (Steps 1-4)**
2. **Click Add a New Value**
3. **Enter the Student ID number**
4. **Enter the Administrative Function and any Variable Data if required.**
5. **Enter the Checklist Code**
6. **Save.**

Manage Checklist Items

1. **Go to the Checklist Management2 Tab.**
2. **Use the + to add additional items**
3. **Change the status to completed or waived.**
4. **If the Checklist is complete return to Checklist Mangement 1 and change the status to completed.**
5. **Save.**