JOB AID

Admissions: Checklist Management

07/27/2021

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This job aid contains instructions for 1) viewing or assigning a student checklist, and 2) viewing/managing all checklists available for assignment.

View/Assign Checklist

Navigation: Campus Community > Checklists > Person Checklists > Checklist Management-Person

The Checklist Management-Person page will appear with the *Find Existing Value* tab showing.

Note: To add a checklist to a student, click the *Add a New Value Tab*, enter the Student ID and complete Steps 3 – 8 below.

Step 1. **ID:** If you know the student's ID, enter it into the Search Criteria.

If you do not know the ID, search for the student by **Last Name**, **First Name**, etc. You must enter at least one piece of information.

Step 2. Click **Search.**

If the student has no checklists assigned, you will see *No Results Found*.

If the student has a checklist assigned, the **Checklist Management-Person** page will appear with the **Checklist Management 1** tab showing.

Step 3. Review/update the required fields on the **Checklist Management 1** tab. Information includes:

a. **Student Name**
b. **Student ID**
c. **Service Indicator**
d. **Checklist Date/Time**
e. **Administrative Function**: Will always be ADMA for the Admission Application.
f. **Academic Institution**: Will always be Michigan State University.
g. **Checklist Code**: Indicates the type of checklist assigned.
h. **Status**: Choose *Initiated* or *Completed*.
i. **Status Date**: Indicates the date the checklist was assigned or completed.
j. **Due Date**: Indicates the deadline for completing this checklist item.

IMPORTANT: Before moving on to the Checklist Management 2 tab, you must click the **Variable Data** button in order to prepopulate the required fields from tab 1.

Step 4. Click the **Variable Data** button.

Step 5. Review/verify the **Variable Data** including**:**

a. **Academic Career**
b. **Application Number**: This number is auto-assigned by the system

Step 6. Click **OK**.

You will be returned to the Checklist Management page where you can continue to Checklist Management 2.

Step 7. Click the **Checklist Management 2** tab.

The top half of the page will display the pre-populated variable data. The **Checklist Item** section will contain all of the required items in the checklist based on the Checklist Code selected, including:

a. **Sequence:** Auto-populates as items are added or removed from the checklist.
b. **Item**: Click the look-up button to see a list of available checklist items (Application Fee, High School Transcript, Test Results, etc.). Scroll down to view the complete list or use the navigational arrows to advance through the items.

   Note: When *Transcript* is selected, additional fields will open for the Org ID
c. **Status**: Use the drop-down to select a status for the assignment.

   Note: *Initiated* will always be used when assigning a new item. The student's actions will drive the other available codes assigned to the item.
d. **Status Date**
e. **Due Date**
f. **Responsible ID/Name**: The MSU staff member assigning the checklist item.

Step 8. Click **Save** if you made any changes.

View Available Checklists

Navigation: Campus Community Checklists > Set Up Checklists > Checklist Table

The **Checklist Table** page will appear with the *Find an Existing Value* tab showing.

Step 1. Click Search to view a list of existing checklist groupings (First-Year Requirements, Transfer Initial Application Requirements, etc.).

Step 2. Select a checklist from the **Search Results** list.

The Checklist Table page will open displaying all items required for the selected checklist to be deemed complete for the student.

Step 3. To add a new item to the checklist, click the **[+] Add a New Row**

Step 4. Click **Save** if you made any changes.