Admissions: Checklist Management

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.

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.

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.

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.