Adding & Viewing Checklists of a Student

This guide will cover:

- How to add a checklist and a checklist item to a specific student to provided them a guided workflow of a certain process (e.g. Change of College and Program)
- How to view a checklist and checklist item of a specific student in the Advisor Center

Step One

Navigate to the following breadcrumb:

```
Main Menu > Campus Solutions > Campus Community > Checklists > Person Checklists > Checklist Management - Person
```

Step Two

On the search criteria page click on the **Add a New Value** tab and enter your student’s ID (Catalyst ID).

If you do not know the student’s Catalyst ID click the magnifying glass to search for the student and select their name from the search results list.

Step Three

The student’s ID should have populated in the ID field.

If so, click **Add**.
**Step Four**

On the checklist management 1 tab click on the magnifying glass for *Administrative function* field and select your intended function.

**Step Five**

Under the drop down menu for *Academic Institution* the value should always be assigned as University of Cincinnati.

**Step Six**

Under the *Checklist Code* click on the magnifying glass to see a list of available codes and select your intended code.

**Step Seven**

When adding a new checklist the status will always be defaulted as *initiated* and status date is prepopulated.

*NOTE:* The status date will change when the status of a checklist is changed to *Completed.*
Step Eight

Click on the **Checklist Management 2 tab** to view the checklist items that have populated based on the selected checklist code selected on the Checklist Management 1 tab.

![Checklist Management screenshot]

Step Nine

Look at the **sequence field**. The system automatically enters the next sequential number.

**NOTE:** You have the ability to override the number manually to reorder the list of items for the particular check list you are creating in the system.

Step Ten

Look at the **Responsible ID.** The ID that defaults is the user who created the checklist on the Checklists page.

You can manually override the ID to reassign responsibility to someone else by clicking on the magnifying glass to search for a staff/faculty name.
**Step Eleven**

The **Due Date** on the checklist item defaults to three months after the status date. However you have the ability to change the date.

Keep in mind that the due date on the checklist items need to be equal or less than the due date set on the Checklist Management 1 tab.

**Step Twelve**

Click **SAVE**

You have now completed the steps for adding a checklist and a checklist item.
The following steps are how the checklists and checklist items would be viewed in the Advisor Center:

**Step Thirteen**

Navigate to the following breadcrumb:

```
Main Menu  ›  Campus Solutions  ›  Self Service  ›  Advisor Center  ›  Advisee General Info
```

**Step Fourteen**

Under the Initiated Checklists section, you will see the checklist and the checklist item that you have added in the previous steps.

![Initiated Checklists](image)

You have now completed the steps for viewing a checklist and a checklist item in the Advisor Center.