University of NorthernIowa
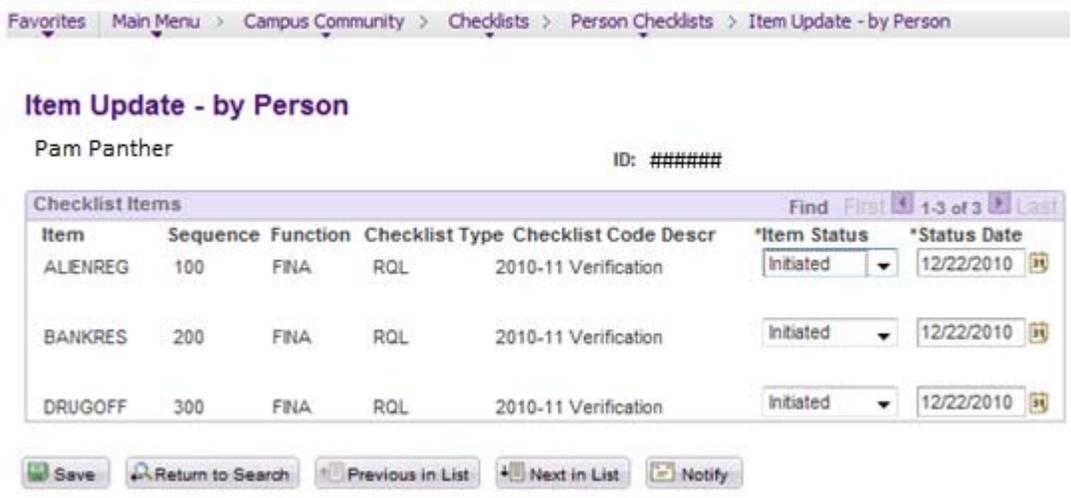
Updating Checklist Items (By Person)

Purpose: Checklist items may be updated by using the Checklist Management pages on which the checklists are assigned or by the Item Update (By Person) process. The below steps describe how to update checklist items manually via the Item Update (By Person).

To add a new checklist item: Use the **Checklist Management 2 tab: Main Menu › Campus Community › Checklists › Person Checklists › Checklist Management-Person**, select the *Checklist Management 2* tab.

Step	Action
1.	Navigate to the **Item Update - by Person** page. Select **Main Menu › Campus Community › Checklists › Person Checklists › Item Update by Person**
2.	Enter *search criteria*. Click the **Search** button. *Result:* The Item Update – by Person page displays.
3.	In the **Item Status** field for the appropriate item, select the desired value. For example, if you have received an item, select "Completed". *Note:* The Status Date defaults to today's date. Adjust as needed.
4.	Click the **Save** button.

Step	Action
5.	To view the Checklist Summary for status on all checklist items, select **Main Menu › Campus Community › Checklists › Person Checklists › Person Checklist Summary**. Select the *appropriate criteria* and click the **Search** button. *Note:* To view the results, users must remove your id number from the **Responsible ID** field, otherwise only checklist items that you have added with display. *Result:* The Checklist Summary page displays.
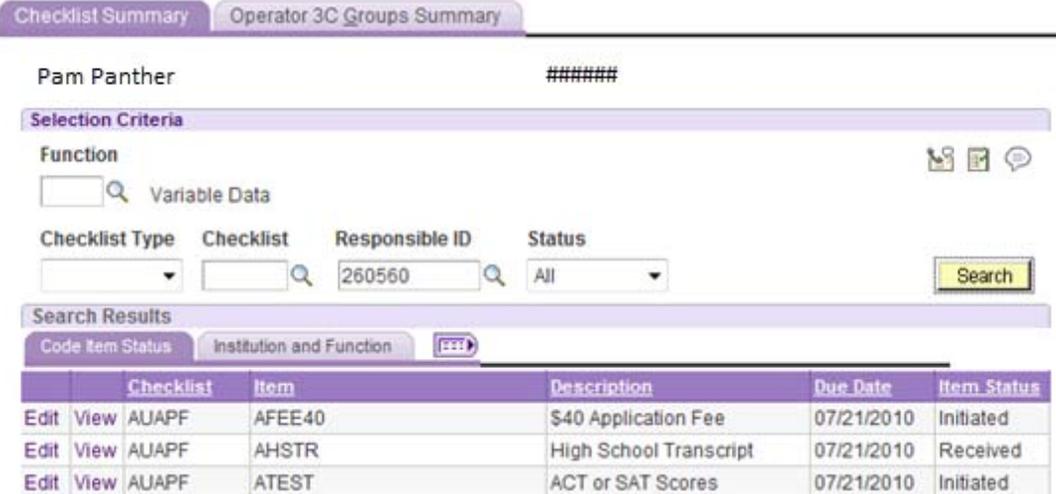
NOTES:

- Checklists are currently updated via overnight batch
- The student will only see checklist items in "Notified" or "Initiated" status

Checklist Item Status

CS	Formerly	Description
Initiated		Item requested, but not received
Received	p-filed	Item is here, but not final
Completed	Filed	Item is here and is final
Cancelled	Not required	Item is not required for this student
Waived	Bill later	For postponing app fee
Notified	(additional)	New item added to checklist – student will receive email asking them to look at checklist again