

Adding a New Item to an Existing Checklist

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

There are many checklists and checklist items for the different modules in *Campus Solutions*. Checklists and their related items are usually added automatically or via a batch process, but they can also be added manually on occasions. Specific checklist Items can also be added to an already existing checklist.

Note: This job aid is for adding an additional checklist item to an already existing checklist. It will not cover adding an entirely new checklist.

In this example, we have received an additional transcript from *College of San Mateo* (CSM) for an incoming student that had not been included in the initial transcript checklist. We need to add that new school to the list of transcripts for this transfer student.

After logging into *Campus Solutions*, navigate to **Campus Community > Checklists > Person Checklists > Checklist Management-Person**.

Search for the student.

Best practice is to use the Student ID# as a unique identifier.

You could also narrow your search to the **Checklist Code** that needs to be edited.

In this example, we will search solely by Student ID#, so that we can see all the checklists associated with this student.

Enter a Student ID# and click **Search**.

The screenshot shows the Berkeley Student Information Systems interface. The breadcrumb trail at the top reads: Favorites > Main Menu > Campus Community > Checklists > Person Checklists > Checklist Management - Person. The page title is "Berkeley". Below the title is a search bar with a "Menu" dropdown and a "Search" button. To the right of the search bar is an "Advanced Search" link. The main heading is "Checklist Management - Person". Below this heading is a subheading "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two buttons: "Find an Existing Value" and "Add a New Value". Below these buttons is a section titled "Search Criteria" with a dropdown arrow. The search criteria section contains several fields: ID (with a "begins with" dropdown and a search icon), Sequence Number (with a "=" dropdown), Administrative Function (with a "begins with" dropdown and a search icon), Checklist Code (with a "begins with" dropdown), National ID (with a "begins with" dropdown), Campus ID (with a "begins with" dropdown), Last Name (with a "begins with" dropdown), and First Name (with a "begins with" dropdown). There is also a checkbox for "Case Sensitive". At the bottom of the search criteria section are three buttons: "Search" (highlighted with a red border), "Clear", and "Basic Search" (with a magnifying glass icon). To the right of the "Basic Search" button is a link "Save Search Criteria".

All the checklists for the student display.

Depending on your access, you may only be able to see **Admissions** and **Onboarding** checklists (starting with A or O). In this example, we can also see a **Financial Aid** and a **Student Records** checklist.

If there are several checklists, you may need to use the arrow keys to navigate or click “View All” to see all the checklists.

In this example, we need to edit the **AUTRFN** (Transfer Finalization) **Checklist** to add a new Item (new school).

Click on the Checklist to edit. In this case we will click on **AUTRFN**.

Checklist Management 1 page
opens.

This page is used when creating new checklists. There is nothing to do on this page to add an additional item.

Click the **Checklist Management 2** tab.

[illegible]

Search Results														
View All														
ID	Sequence Number	Administrative Function	Checklist Code	National ID	Country	NID	Short Description	National ID	Date of Birth	Gender	Name	Campus ID	Last Name	First Name
3010000001	1	FINA	FFAFSA	USA	SSN	*****	****/****/****	Male	Admit	Anthony	1521372	ADMIT	ANTHONY	
3010000002	2	ADMP	AUTISM	USA	SSN	*****	****/****/****	Male	Admit	Anthony	1521372	ADMIT	ANTHONY	
3010000003	3	ADMP	AUSIR	USA	SSN	*****	****/****/****	Male	Admit	Anthony	1521372	ADMIT	ANTHONY	
3010000004	4	ADMA	OITS01	USA	SSN	*****	****/****/****	Male	Admit	Anthony	1521372	ADMIT	ANTHONY	
3010000005	5	ADMA	RASRLR	USA	SSN	*****	****/****/****	Male	Admit	Anthony	1521372	ADMIT	ANTHONY	
3010000007	7	ADMA	OQ015	USA	SSN	*****	****/****/****	Male	Admit	Anthony	1521372	ADMIT	ANTHONY	
3010000013	13	ADMA	OQADVS	USA	SSN	*****	****/****/****	Male	Admit	Anthony	1521372	ADMIT	ANTHONY	

Checklist Management 1		Checklist Management 2	
Anthony Admit		ID: 30	
Checklist Date Time:	04/28/2016 11:24:19AM	Variable Data	
*Administrative Function:	ADMP	Admissions Program	
*Academic Institution:	UC Berkeley		
*Checklist Code:	AUTRFN	Transfer Finalization	
*Status:	Initiated	Status Date:	04/28/2016
Due Date:	07/01/2016		
Due Amount:	<input type="text"/>	<input type="text"/>	Currency Code
Comments:	<div></div>		

The **Checklist Management 2** page appears.

We can see there are several schools that we have requested transcripts for and one that we have already received (*Santa Rosa Junior College*).

The screenshot shows the 'Checklist Management 2' page for user Anthony Admit. It displays a table of transcript requests with columns for Sequence, Item, Status, Status Date, and Due Date. The table contains four rows of data, each with a 'Responsible' field and a 'Description' field. The first row is for 'Next Steps' (Sequence 100, Status Completed). The second row is for 'CLETR' (Sequence 200, Status Received, Description: Santa Rosa Junior College). The third row is for 'CL Trans.' (Sequence 300, Status Initiated, Description: Laney College). The fourth row is for 'HS Trans' (Sequence 400, Status Initiated, Description: Da Vinci Charter Academy). At the bottom, there are buttons for Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

*Sequence	*Item	*Status	*Status Date	*Due Date
100	Next Steps	Completed	04/28/2016	07/01/2016
200	CLETR	Received	05/06/2016	07/01/2016
300	CL Trans.	Initiated	04/28/2016	07/01/2016
400	HS Trans	Initiated	04/28/2016	07/01/2016

To add another school, we need to add another line.

Click the plus button (+) on the last row to add a new line. The system will add a new row and automatically generate a new sequence number (e.g. 500) that keeps track of the order in which the transcript items were added.

This screenshot shows the same 'Checklist Management 2' page after a new row has been added. The new row (Sequence 500) is highlighted with a red box and contains empty fields for Item, Status, Status Date, and Due Date. The 'Responsible' field is populated with '3030858312'. The 'Add' button at the bottom right is also highlighted with a red box, indicating it was used to add the new row.

*Sequence	*Item	*Status	*Status Date	*Due Date
300	CL Trans.	Initiated	04/28/2016	07/01/2016
400	HS Trans	Initiated	04/28/2016	07/01/2016
500		Initiated	04/28/2016	

Now we'll fill in the rest of the values.

If you know the **Item code** you are adding (e.g. **ACLUTR** – College Transcript), type it in, otherwise use the Lookup Icon to see the available choices.

Change the **Status** to **Received** to indicate the transcript was received.

Leave the **Status Date** defaulted to the date you are adding the checklist item (unless you wish to change it to the day the transcript was received).

In this example, we will leave **Due Date** blank, as this is not a request that needs to be fulfilled.

Note: If you are initiating a new request, fill in a Due Date (the date the transcript needs to be received by).

Change the **Responsible ID** to show this is coming from the Admissions Office (rather than from a specific person). In this example we added **UCBUGA**, which will display to the student as “*Undergraduate Admissions, Office OP*”.

Once we chose an Item code that is related to a school, an additional field opened up for an **ORG ID**. This will show which school the transcript is from. Use the Lookup Icon to search for school names.

Tip: Search by “contains” instead of “begins with” to get better results.

*Sequence	*Item	*Status	*Status Date	*Due Date
500	ACLUTR CL Trans.	Received	06/07/2016	

Responsible ID: UCBUGA Name: Undergraduate Admissions, Office of
Org ID: 3031000649 Description: Foothill College

*Sequence	*Item	*Status	*Status Date	*Due Date
300	ACLUTR CL Trans.	Initiated	04/28/2016	
400	AHSTR HS Trans.	Initiated	04/28/2016	
500	ACLUTR CL Trans.	Received	06/07/2016	

Responsible ID: UCBUGA Name: Undergraduate Admissions, Office of
Org ID: 3031004484 Description: Laney College

Responsible ID: UCBUGA Name: Undergraduate Admissions, Office of
Org ID: 3031020903 Description: Da Vinci Charter Academy

Responsible ID: UCBUGA Name: Undergraduate Admissions, Office of
Org ID: Description:

Look Up Org ID

External Org ID: begins with
Search Name: contains
Organization Type: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

External Org ID	Search Name	Organization Type	Description
3029999999	ORGFORCUMULATIVESTATS	SCHL	Org for Cumulative Stats
3030927771	PILLSBURYBAPTISTBIBLECOLL	SCHL	Pillsbury Baptist Bible Coll
3030927784	"AMERICANUNIVOFROME,THE"	SCHL	"American Univ Of Rome, The"
3030927797	OKLAHOMACITYCITYCOLLEGE	SCHL	Oklahoma City Cmty College
3030927810	UTEXASSOUTHWESTERN	SCHL	U Texas Southwestern
3030927823	SOUTHWESTTENNESSEECMTCOLL	SCHL	Southwest Tennessee Cmty Coll
3030927836	INSTOFTECHSTUDIES	SCHL	Inst Of Tech Studies
3030927849	STATETECHINSTMEMPH	SCHL	State Tech Inst Memp
3030927862	SCOTTCMTCOLL	SCHL	Scott Cmty Coll

When you have finished adding all the information, be sure to click the **Save** button.

*Sequence	*Item	*Status	*Status Date	*Due Date
400	AHSTR HS Trans	Initiated	04/28/2016	07/01/2016
Responsible: UCBUGA ID: 3031020903 Org ID: 3031020903 Name: Undergraduate Admissions, Office of Description: Da Vinci Charter Academy				
500	ACLUTR CL Trans.	Received	06/07/2016	
Responsible: UCBUGA ID: 3031000649 Org ID: 3031000649 Name: Undergraduate Admissions, Office of Description: Foothill College				

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

The student should see the checklist item on their CalCentral page within a half hour.

Support:

For questions or assistance, please contact Campus Shared Services IT.:

- Call **510-664-9000** (press **option 6** to reach SIS support)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://berkeley.service-now.com/ess/create_incident