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**.

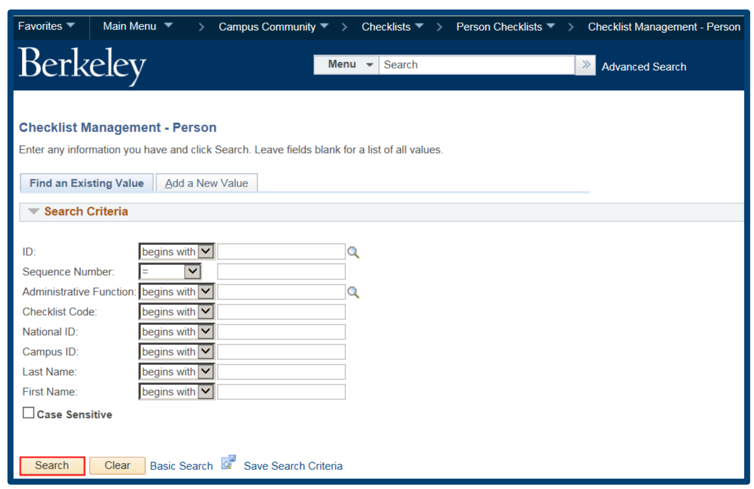
Search for the student.

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.

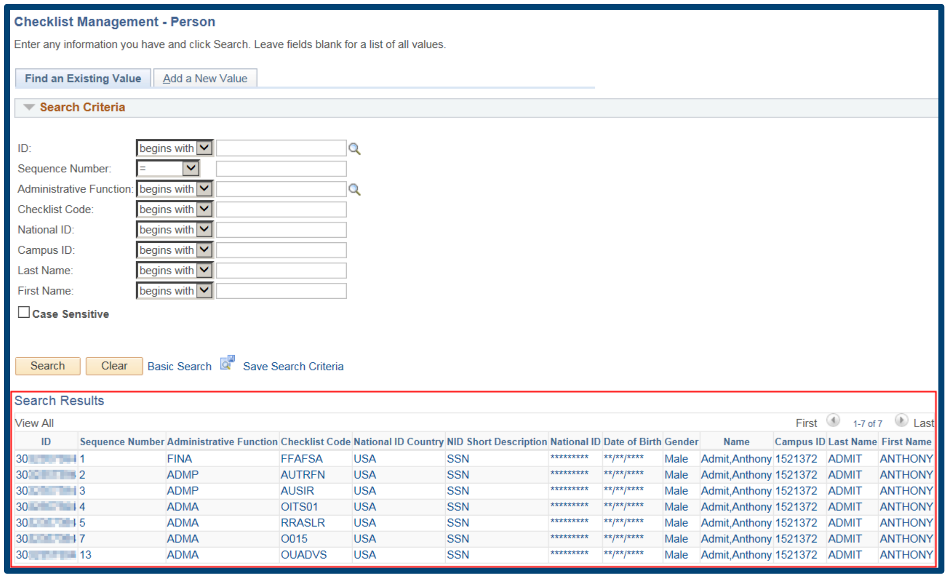
Enter a Student ID# and click `Search`.



All the checklists for the student display.

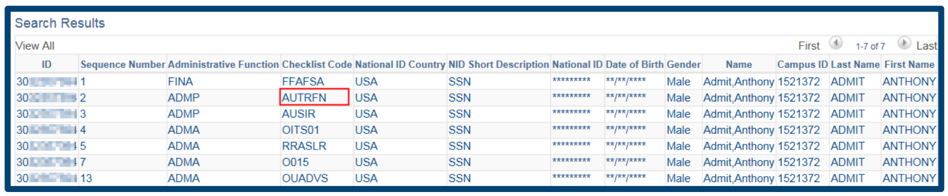
Depending on your access, you may only be able to see **Admissions** and **Onboarding** checklists (starting with A or O). In this example, we can also see a **Financial Aid** and a **Student Records** checklist.

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).

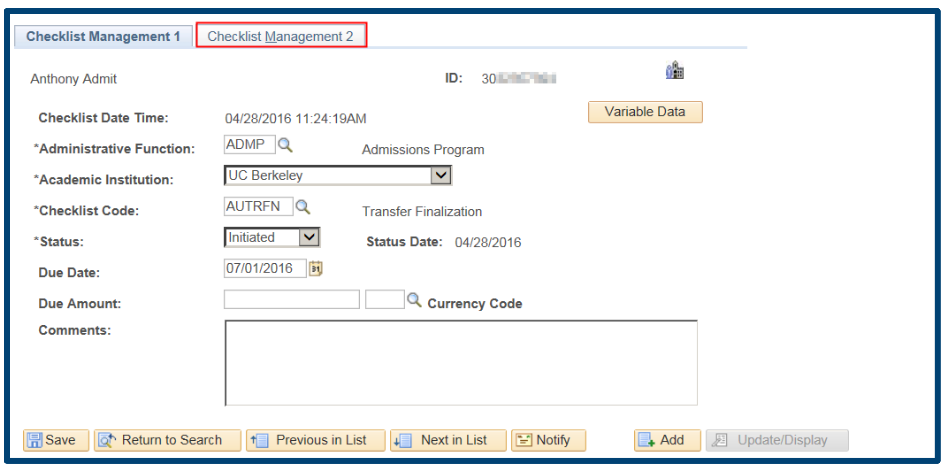
Click on the Checklist to edit. In this case we will click on **AUTRFN**.



Checklist Management 1 page opens.

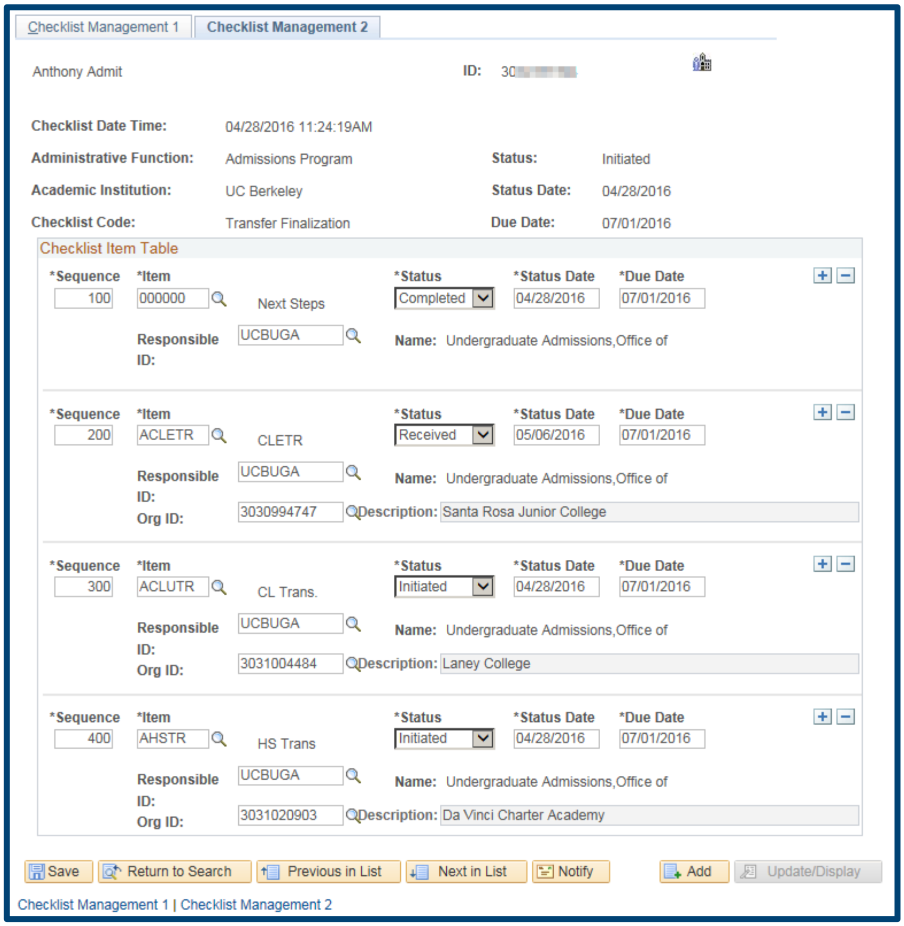
This page is used when creating new checklists. There is nothing to do on this page to add an additional item.

Click the **Checklist Management 2** tab.



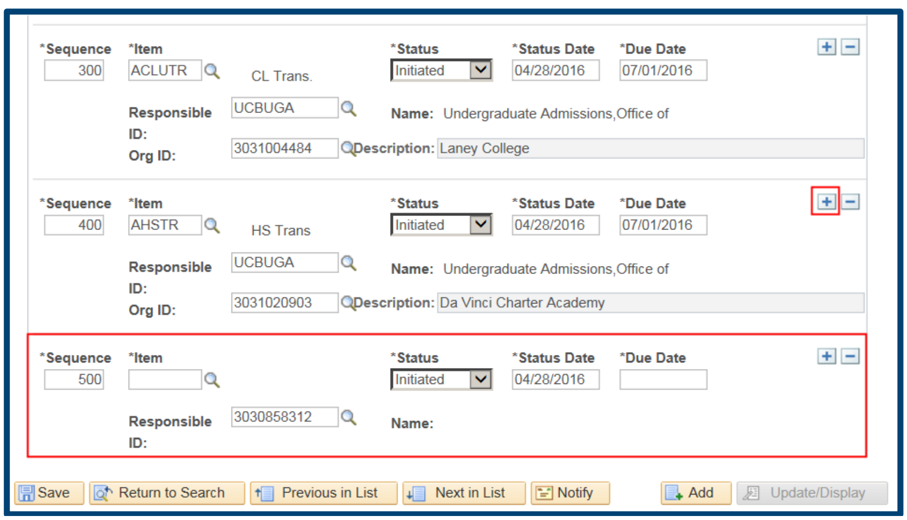
The **Checklist Management 2** page appears.

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



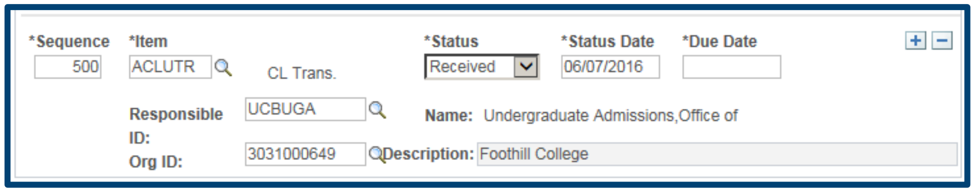
To add another school, we need to add another line.

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.



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.



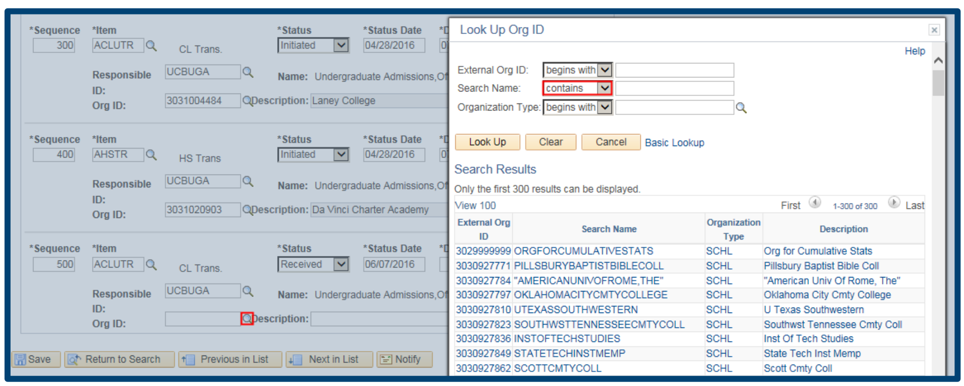
Change the **Status** to **Received** to indicate the transcript was received.

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).

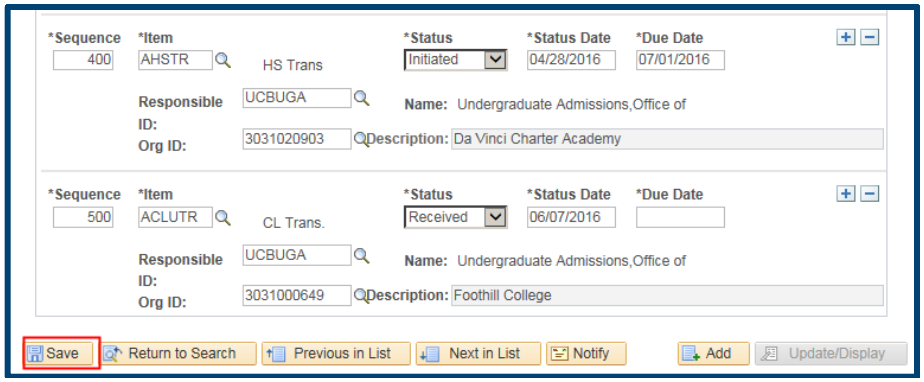
Change the **Responsible ID** to show this is coming from the Admissions Office (rather than from a specific person). In this example we added **UCBUGA**, which will display to the student as "*Undergraduate Admissions, Office Of*".



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.

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



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**