

Manually Updating Admissions Checklists

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

Changing the status or completing a checklist can be done several ways (manual changes, API Interface, ImageNow updates, Query based updates (QBUs) and file transfers). Sometimes, updates will occur automatically (e.g. *Received* status is updated by ImageNow), but Admissions staff will occasionally need to make a manual update.

In this example, we'll manually update the status of an undergraduate Finalization checklist after reviewing a transcript.

NOTE: If this is your first time visiting this page, you can click the Favorites link in the top left corner and “Favorite” this page.

Log into **Campus Solutions** and navigate to the **Checklist Management-Person** search page.

Search for a student. The best practice is to search by Student ID, since that is a unique value.

The search results will display Admissions Checklists assigned to this admitted applicant. If there are too many to display, use the arrow keys to scroll, or click “View All” to see all checklists.

There are different checklist items for the different modules, and the results will depend on a user’s access.

Admissions staff will only see Admissions and Onboarding checklists. A list of Undergraduate Admissions checklists can be found:

http://sisproject.berkeley.edu/sites/default/files/Admissions_Checklist_Codes.pdf

In this example, we see a Financial Aid checklist (starts with “F”), a Records checklist (starts with “R”), some Onboarding checklists (starts with “O”) and Admissions checklists (starts with “A”)

The screenshot shows the 'Checklist Management - Person' search page. The search criteria section includes fields for ID, Sequence Number, Administrative Function, Checklist Code, National ID, Campus ID, Last Name, and First Name. The search results section displays a table of results for a student with ID 3010000001.

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
3010000001	2	ADMP	AUTFRN	USA	SSN					Male	Admit,Anthony	1521372	ADMIT	ANTHONY
3010000001	3	ADMP	AUSIR	USA	SSN					Male	Admit,Anthony	1521372	ADMIT	ANTHONY
3010000001	4	ADMA	OITS01	USA	SSN					Male	Admit,Anthony	1521372	ADMIT	ANTHONY
3010000001	5	ADMA	RRASLR	USA	SSN					Male	Admit,Anthony	1521372	ADMIT	ANTHONY
3010000001	7	ADMA	O015	USA	SSN					Male	Admit,Anthony	1521372	ADMIT	ANTHONY
3010000001	13	ADMA	OUADVS	USA	SSN					Male	Admit,Anthony	1521372	ADMIT	ANTHONY

Click on an **Item Code** to view and edit the details of that checklist.

In this example, we will click on **AUTRFN** (Transfer Finalization checklist)

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
3010000001	1	FINA	FFAFSA	USA	SSN	*****	*****	*****	*****	Male	Admit,Anthony	1521372	ADMIT
3010000002	2	ADMP	AUTRFN	USA	SSN	*****	*****	*****	*****	Male	Admit,Anthony	1521372	ADMIT
3010000003	3	ADMP	AUSIR	USA	SSN	*****	*****	*****	*****	Male	Admit,Anthony	1521372	ADMIT
3010000004	4	ADMA	OITS01	USA	SSN	*****	*****	*****	*****	Male	Admit,Anthony	1521372	ADMIT
3010000005	5	ADMA	RRASLR	USA	SSN	*****	*****	*****	*****	Male	Admit,Anthony	1521372	ADMIT
3010000007	7	ADMA	O015	USA	SSN	*****	*****	*****	*****	Male	Admit,Anthony	1521372	ADMIT
3010000013	13	ADMA	OUADVS	USA	SSN	*****	*****	*****	*****	Male	Admit,Anthony	1521372	ADMIT

The **Checklist Management 1** page displays the overall status of the checklist and is primarily used when creating a new checklist.

In this example, we will not be making any edits on this page.

Click on the **Checklist Management 2** tab.

Favorites Main Menu Campus Community Checklists Person Checklists Checklist Management - Person

Berkeley Menu Search Advanced Search

Checklist Management 1 Checklist Management 2

Anthony Admit ID: 3010000001

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 Currency Code

Due Amount:

Comments:

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

Checklist Management 1 | Checklist Management 2

The **Checklist Management 2** page displays.

This Admissions checklist code (**AUTRFN Transfer Finalization**) has several transcript checklist items linked to the schools the applicant has attended.

Each of these rows is for a different school.

The Status differs depending on where in the process that transcript is. For example, we have received the *Santa Rosa Junior College* transcript, but are still awaiting *Laney College & DaVinci Academy* transcripts (still in *Initiated* status).

Checklist Management 1

Checklist Management 2

Anthony Admit

ID: 30

Checklist Date Time:

04/28/2016 11:24:19AM

Administrative Function:

Admissions Program

Status:

Initiated

Academic Institution:

UC Berkeley

Status Date:

04/28/2016

Checklist Code:

Transfer Finalization

Due Date:

07/01/2016

Checklist Item Table

*Sequence	*Item	*Status	*Status Date	*Due Date
100	000000 Next Steps	Completed	04/28/2016	07/01/2016
	Responsible ID: UCBUGA	Name: Undergraduate Admissions, Office of		
200	ACLETR CLETR	Received	05/06/2016	07/01/2016
	Responsible ID: UCBUGA	Name: Undergraduate Admissions, Office of		
	Org ID: 3030994747	Description: Santa Rosa Junior College		
300	ACLUTR CL Trans.	Initiated	04/28/2016	07/01/2016
	Responsible ID: UCBUGA	Name: Undergraduate Admissions, Office of		
	Org ID: 3031004484	Description: Laney College		
400	AHSTR HS Trans	Initiated	04/28/2016	07/01/2016
	Responsible ID: UCBUGA	Name: Undergraduate Admissions, Office of		
	Org ID: 3031020903	Description: Da Vinci Charter Academy		

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Checklist Management 1

Checklist Management 2

Click on the **Status** drop-down list to see the available statuses.

Select the appropriate status. In most cases you will only set a status to either **Completed** or **Incomplete**.

In this example, we received and reviewed the *Santa Rosa Junior College* transcript and have evaluated it against the self-reported data.

Therefore we will change the status to **Completed**. If this transcript had missing information, we might have changed the status to **Incomplete** instead and let the student know we need further information.

Notice that the **Status Date** has also automatically updated to the date you made the change.

Note: This is one of the few times we should NOT click a plus button to add new information. Doing so would prompt you to add a new Checklist item.

Remember to click **Save** when you are done, otherwise the changes will be lost.

The student will soon see the updated status on their **CalCentral** page.

If you are done updating this checklist, use the menu to navigate to a new page or click **Sign Out**. When you are finished, make sure to exit the browser as well. Do not leave open browser windows unattended.

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

Checklist Management 1 | Checklist Management 2

Anthony Admit ID: 30

Checklist Date Time: 04/28/2016 11:24:19AM

Administrative Function: Admissions Program Status: Initiated

Academic Institution: UC Berkeley Status Date: 04/28/2016

Checklist Code: Transfer Finalization Due Date: 07/01/2016

*Sequence	*Item	*Status	*Status Date	*Due Date
100	Next Steps	Completed	04/28/2016	07/01/2016
200	CLETR	Completed	05/26/2016	07/01/2016
300	CL Trans.	Initiated	04/28/2016	07/01/2016
400	HS Trans	Initiated	04/28/2016	07/01/2016

Responsible ID: UCBUGA Name: Undergraduate Admissions, Office of

Org ID: 3030994747 Description: Santa Rosa Junior College

Org ID: 3031004484 Description: Laney College

Org ID: 3031020903 Description: Da Vinci Charter Academy

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

Checklist Management 1 | Checklist Management 2