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.

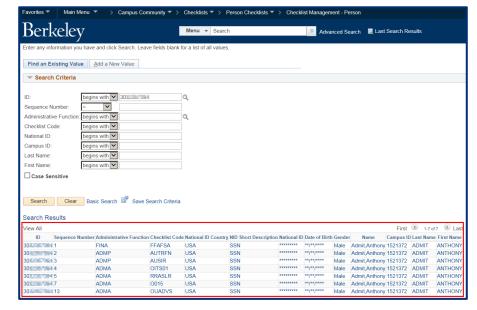
The search results will display Admissions Checklists assigned to this admitted applicant. If there are too many to display, use the arrow keys to scroll, or click "View All" to see all checklists.

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")





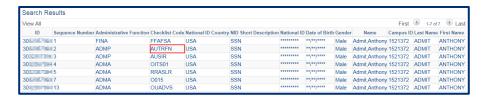
Click on an **Item Code** to view and edit the details of that checklist.

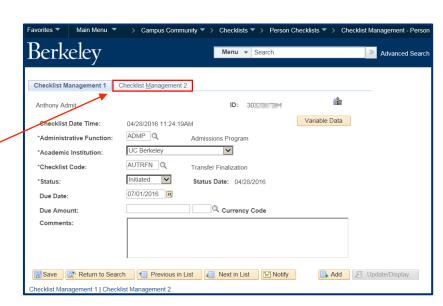
In this example, we will click on **AUTRFN** (Transfer Finalization checklist)

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.



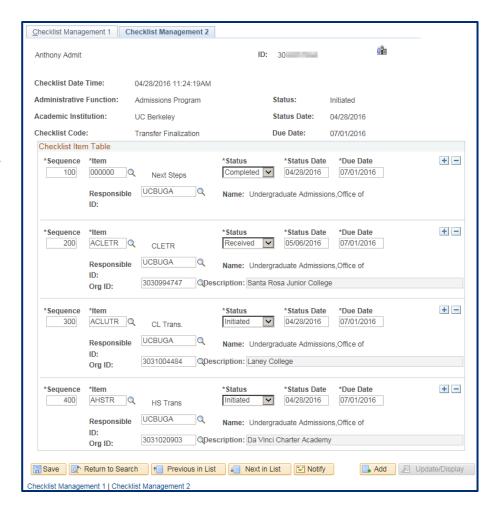


The **Checklist Management 2** page displays.

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 Academcy* transcripts (still in *Initiated* status).



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 selfreported 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.

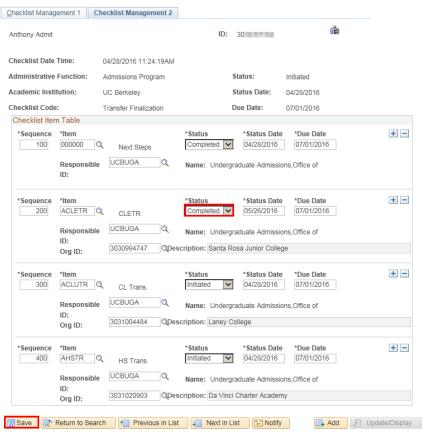
Notice that the **Status Date** has also automatically updated to the date you made the change.

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.



Checklist Management 1 | Checklist Management 2

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