3C’s - Comments, Checklists, Communications

Checklist Item Update – by Person

Description

Use checklists to assign lists of requirements or a series of communications to individuals (primarily), organizations, events, or groups of individuals and monitor progress toward completing those requirements. You can use to track applications, organize recruitment mailings, assign tasks to staff members, generate a series of communication items, and so on.

You can update the status of checklist items manually on the same checklist management pages where you assign the items, or you can view a summary of all checklist items assigned to an individual and manually update each checklist item status there.

Process Steps

Step 1. Checklist Item Update – by Person

Navigation:
Campus Community > Checklists > Person Checklists > Item Update – by Person

Follow this navigation to access the Item Update – by Person Search page.

Step 1.1: Checklist Item Update – by Person Search Page

<table>
<thead>
<tr>
<th>Item Update - by Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter any information you have and click Search. Leave fields blank for a list of all values.</td>
</tr>
</tbody>
</table>

Find an Existing Value

- ID: begins with 01 37344
- Sequence Number: =
- Administrative Function: begins with
- Checklist Code: begins with
- National ID: begins with
- Campus ID: begins with
- Last Name: begins with
- First Name: begins with

Case Sensitive

Search  Clear  Basic Search  Save Search Criteria
1.1.1 ID: If you know the student’s EMPLID, enter it here. This is the most efficient way to search for a student.

1.1.2 Sequence Number: The system assigns a sequence number to checklists assigned to individuals. You can limit your search by that number.

1.2.3 Administrative Function: You can limit your search to checklists within a given Administrative Function.

1.2.4 Checklist Code: You can limit your search to specific checklists for this person.

1.2.5 National ID: If you know the student’s National ID number (Social Security Number for USA, Social Insurance Number for Canada), enter it here.

1.2.6 Campus ID: The University of Maine System is not currently using the Campus ID.

1.2.7 Last Name: You can enter a portion of the last name as search criteria if desired.

1.2.8 First Name: You can enter a portion of the first name as search criteria if desired.

Click Search to continue or Clear to have the system clear all of the text boxes so you can start again.

Step 1.2: Checklist Item Update – by Person

Access a summary of checklists for an ID (individual or organization) to confirm or update checklist item status.

**Item Update - by Person**

<table>
<thead>
<tr>
<th>Item</th>
<th>Sequence</th>
<th>Function</th>
<th>Code Type</th>
<th>Checklist Code Descr</th>
<th>Item Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appliance Fee</td>
<td>100</td>
<td>ADM 5</td>
<td>RGL</td>
<td>Traditional Application</td>
<td>Initiated</td>
<td>02/02/2006</td>
</tr>
<tr>
<td>Essay</td>
<td>300</td>
<td>ADM 5</td>
<td>RGL</td>
<td>Traditional Application</td>
<td>Initiated</td>
<td>02/02/2006</td>
</tr>
</tbody>
</table>

Click Save on the Checklist Item Update – by Person page to save your changes.

### Source Documents

Effective Date: July 31, 2006
Updated: 02/21/2006
Security Roles

Maintained by:

Do not restrict access. Data access is controlled by 3C Group Security.

Viewable by:

APPROVED and TESTED by Admissions and Campus Community Team on February 21, 2006.