

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

Item Update - by Person
Enter any information you have and click Search. Leave fields blank for a list of all values.

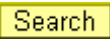

Find an Existing Value

ID:	begins with	▼	<input type="text" value="0137344"/>	
Sequence Number:	=	▼	<input type="text"/>	
Administrative Function:	begins with	▼	<input type="text"/>	
Checklist Code:	begins with	▼	<input type="text"/>	
National ID:	begins with	▼	<input type="text"/>	
Campus ID:	begins with	▼	<input type="text"/>	
Last Name:	begins with	▼	<input type="text"/>	
First Name:	begins with	▼	<input type="text"/>	

Case Sensitive

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


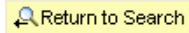
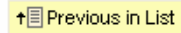
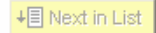
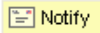
Step 1.2: Checklist Item Update – by Person

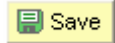
Access a summary of checklists for an ID (individual or organization) to confirm or update checklist item status.

Item Update - by Person

Pavel Chekov ID: 0137344

Checklist Items						Find	First	1-2 of 2	Last
Item	Sequence	Function	Checklist Type	Checklist Code	Descr	*Item Status	*Status Date		
Applic Fee	100	ADMP	RQL		Traditional Application	Initiated 	02/02/2006 		
Essay	300	ADMP	RQL		Traditional Application	Initiated 	02/02/2006 		

- 1.2.1 **Item, Sequence Number, Function, and Checklist (type)** The system displays information for these from all the checklists assigned to the individual on the Checklist Management 1 page.
- 1.2.2 **Item Status:** Enter the updated status of the checklist item: *Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived, or Cancelled.*
- If all items within a Checklist are either Completed or Waived, the overall Checklist is marked completed. Otherwise it is marked as Initiated.**
- 1.2.3 **Status Date:** When you update the status of a checklist item, the system automatically changes the status date to the system's current date. You can override this date.
- 1.2.4 Click  on the Checklist Item Update – by Person page to save your changes.

Source Documents

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.