

9.2 Create a New Checklist Item (Financial Aid)

Purpose: Use this document as a reference for how to manage checklists in ctcLink.

Audience: FA Director.

! You must have at least one of these local college managed security roles:

- ZC FA Local Configuration
- ZD FA Local Configuration

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

You must also set the following SACR Security permissions:

- [CS 9.2 SACR Security: Basic Requirements for Staff](#)
- [CS 9.2 SACR Security: 3Cs Group Security](#)

Create a New Checklist Item

Checklist Item Table

i Use the **Checklist Item Table** to define and manage items to make available for checklists and to configure the **Checklist Items** that appear in **Fluid Self Service**.

Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist Item Table

1. The Checklist Item Table search page displays.
2. Select the **Add a New Value** tab.
3. Enter the **Checklist Item Code** and select the **Add** button.



Note: Checklist item codes are institution specific.

Checklist Item Table

[Find an Existing Value](#) [Add a New Value](#)

Checklist Item Code

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

4. The Checklist Item Table page displays.
5. In the **Item Code Detail** section - Populate the following fields:
 - a. **Effective Date** – date of checklist creation.
 - b. **Status** – select the appropriate status – usually “Active.”
 - c. **Checklist Code Descr** – full text description.
 - d. **Short Description** – short description.
 - e. **Item Association** – select the appropriate association or leave blank. The **Item Association** that you select here is used on checklist management pages when you assign checklists to IDs and for a number of automated processes.
 - f. **Comments** – comments for the checklist item. Note that this is a rich text field, so you can format text and include external URLs or email links that are displayed on a Fluid User Interface.



Note: Comments are viewable to students in the ‘to do’ list in Student Services Center.

Checklist Item Table

Checklist Item Code CLEC00

Item Code Detail Find | View All First 1 of 1 Last

*Effective Date 01/01/1980 *Status Active

*Checklist Code Descr Emergency Contact Confirmation

Short Description Emerg Cntc

Item Association Name

Comments

Please provide missing emergency contact information to complete your student record.

6. In the **Fluid Field Display** section - Set up these optional fields for the **Fluid** User Interface.
- Checkboxes** - Select a checkbox to display the field on the **Task Details** page from **Person Checklist Item**.

Fluid Field Display

☐ Organization

☐ Variable Data

☐ Status

☐ Status Date

☒ Contact Name

☒ Contact Email

☒ Due Date

- Action Button Label** - Sets up a button in the **Hold Details** modal page to navigate to another **Fluid** self-service page. The label value has a maximum of 30 characters in order to avoid horizontal scrolling.

Fluid Field Display

☐ Organization
☐ Variable Data
☐ Status
☐ Status Date
☒ Contact Name
☒ Contact Email
☒ Due Date

Action Button Label: Add emergency Contact
 *Menu Name:
 *Component Name:
 *Page Name:

Save Notify Add Update/Display Include History Correct History

7. Configure the **Upload File Functionality** for **Fluid Application Status**

- a. Enter the **Menu Name**, **Component name** and **Page Name** to be used. - Start typing in the field to select from the list of possible choices.

Fluid Field Display

☐ Organization
☐ Variable Data
☐ Status
☐ Status Date
☒ Contact Name

Menu Name	Description
SCC_PAYMENT_PROCESSING	Electronic Payment Processing
SCC_PREFERENCES_FL	Preferences
SCC_PROFILE_FL	Profile Details

Action Button Label:
 *Menu Name: SCC_P
 *Component Name:
 *Page Name:

Save Notify Add Update/Display Include History Correct History

8. Select the **Save** button to save your work.


Fluid Field Display

☐ Organization
☐ Variable Data
☐ Status
☐ Status Date
☒ Contact Name
☒ Contact Email
☒ Due Date

Action Button Label: Add Emergency Contact
 *Menu Name: SCC_PROFILE_FL Profile Details
 *Component Name: SCC_EMERG_CNTCT_FL Emergency Contacts
 *Page Name: SCC_EMERG_CNTCT_FL Emergency Contacts

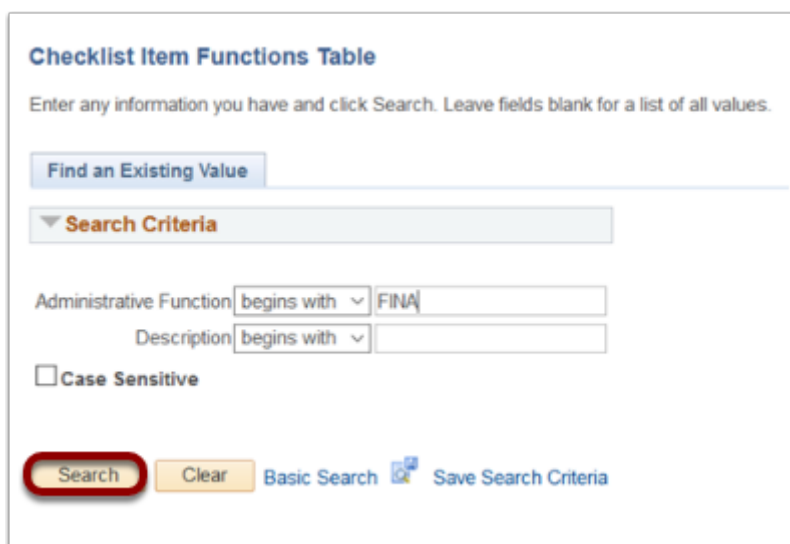
Save Notify Add Update/Display Include History Correct History

Checklist Item Functions Table

 Use the **Checklist Item Functions Table** to associate Checklist Item(s) with **Administrative Function(s)**. This will make the **Checklist Items** available for selection from the **Item Code** field on the **Checklist Table** page.

Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist Item Functions Table

1. The Checklist Item Functions Table search page displays.
2. Enter the **Administrative Function** (FINA, FINT, GEN) you want to associate with your new **Checklist Item**.
3. Select **Search**.



4. The Checklist Item Functions Table page displays.
5. Scroll to the bottom of the page and select **Add**.

Checklist Item Functions Table

Administrative Function FINA Financial Aid

Item List

*Item Code	Description	
ESF000	Birth Certificate	-
ESF001	Checking/Saving/Asset Info	-
ESF002		-
ESF003	Master Promissory Note	-
FTC032	Aggregate 2018-2019	-
FTC033	Household Resources 2018-2019	-
FTC034	Proof of Non-filing taxes 2016	-
FTC111	Proof Non-filing-Parents 2016	-

Add

Save Return to Search Notify

- Start typing in the Checklist **Item Code** field to select the new **Checklist Item**. Tab out of the field to display the **Description**.

FTC031	Custom 2018-2019	-
FTC032	Aggregate 2018-2019	-
FTC033	Household Resources 2018-2019	-
FTC034	Proof of Non-filing taxes 2016	-
Checklist Item Code	Description	
CLEC00	Emergency Contact Confirmation	-
CLEC0		-

Add

- Select **Save** to save your work.

FTC034	Proof of Non-filing taxes 2016	-
FTC111	Proof Non-filing-Parents 2016	-
CLEC00	Emergency Contact Confirmation	-

Add

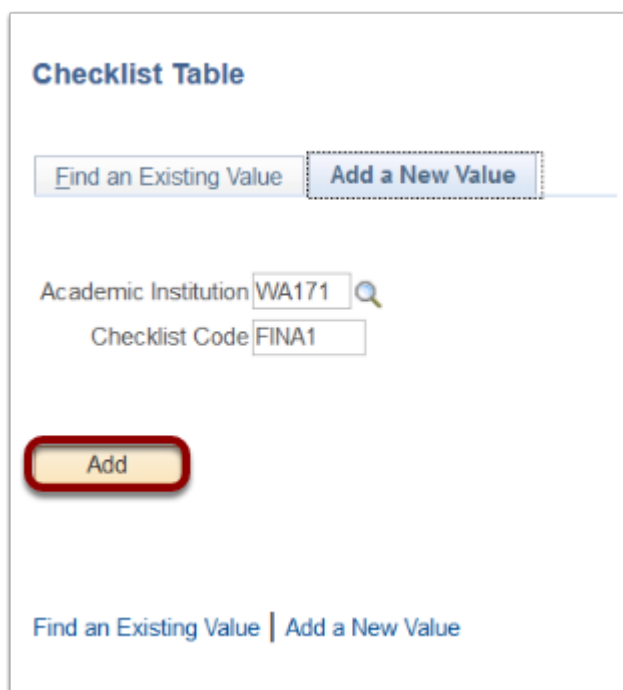
Save Return to Search Notify

Checklist Table

 Use the **Checklist Table** to create and manage **Checklists**.

Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist Table

1. The Checklist Table search page displays.
2. Select **Add a New Value**.
3. The **Checklist Table** page displays.
4. Enter the **Academic Institution**.
5. Enter the new **Checklist Code**
6. Select **Add**.



The screenshot shows the 'Checklist Table' search interface. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, there are two input fields: 'Academic Institution' with the value 'WA171' and a search icon, and 'Checklist Code' with the value 'FINA1'. At the bottom left, there is a red 'Add' button. At the bottom, there are two links: 'Find an Existing Value' and 'Add a New Value'.

7. In the **Detail** section of the **Checklist Table** page, populate the following fields:
 - a. **Effective Date** – date of the checklist creation.
 - b. **Description** – enter a description that matches the description created in the previous section.
 - c. **Short Description** – enter a short description that matches the short description in the previous section.
 - d. **Function** – select the appropriate function by clicking on the lookup icon.
 - e. **Checklist Type** – select the checklist type.
 - f. **Display in Self Service** – select the checkbox to allow students to view this checklist item in **Self Service**.

- g. **Due Days** – Select the appropriate number of days the checklist item is due from the date of assignment.
- h. **Due Date** – Enter the appropriate **Due Date** (optional).
- i. **Tracking Group** – SBCTC is not configured for tracking groups.

Checklist Table

Academic Institution WA171 Spokane CC

Checklist Code FINA1

Detail Find | View All First 1 of 1 Last

*Effective Date 07/09/2018 *Status Active

*Description Financial Aid Student Record ☒ Display in Self Service

Short Description FA Stu Rec Due Days 14

*Function FINA Financial Aid Due Date

Checklist Type Medical Tracking Group

Item List Personalize | Find | First 1 of 1 Last

*Sequence	*Item Code	Description	Default Due Date	Due Days	Hide	Communication Key
100					<input type="checkbox"/>	

Display Checklist Items Personalize | Find | First 1 of 1 Last

*Item Status

Save Notify Add Update/Display Include History Correct History

8. In the **Item List** section populate the following fields:
- a. **Sequence** – the appropriate **Sequence** number (Currently SBCTC is using 100 for all checklist items).
 - b. **Item Code** – enter or use the lookup tool to select the **Item Code** for the **Checklist** created.

Checklist Table

Academic Institution WA171 Spokane

Checklist Code FINA1

Detail

*Effective Date 07/09/2018

*Description Financial Aid Student Rec

Short Description FA Stu Rec

*Function FINA Financial Aid

Checklist Type Medical

Item List

*Sequence *Item Code Description

100 [] []

Display Checklist Items

*Item Status

Save Notify

Look Up Item Code

Administrative Function FINA

Checklist Item Code begins with

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Checklist Item Code	Item Association	Description	Short Description
CLEC00	(blank)	Emergency Contact Confirmation	Emerg Cntc
ESF000	(blank)	Birth Certificate	BirthCert
ESF001	(blank)	Checking/Saving/Asset Info	CkSvAsset
ESF003	(blank)	Master Promissory Note	MPN
ESF004	(blank)	Contact Financial Aid Office	ContactFA
ESF005	(blank)	Valid High School	HSPProof
ESF006	(blank)	HS Diploma/HS Transcript/GED	HSDiploma
ESF007	(blank)	SFCC 17-18 Terms & Conditions	17-18 T&C
ESF008	(blank)	Defaulted Loan	DefaultLn
ESF009	(blank)	Emancipated Minor Documents	EmancpMnr
ESF010	(blank)	FAFSA Error	Reject

- c. **Default Due Date** – SBCTC is not using default due dates at this time.
- d. **Due Days** – enter the **Due Days** from the **Detail** section in the previous step.
- e. **Comm Key** – SBCTC is not using **Communication Key** at this time.

Checklist Type Medical Tracking Group

Item List

Personalize Find First 1 of 1 Last

*Sequence	*Item Code	Description	Default Due Date	Due Days	Hide	Communication Key
100	CLEC00	Emerg Cntc		14	<input type="checkbox"/>	

- 9. **Display Checklist** section is only used for the **Fluid User Interface**.
 - a. The grid only appears if the **Display in Self Service** check box in the **Detail Section** is selected.
 - b. Select **Item Status** value(s) from the drop down lists.

i Note: This setup determines if these checklist items appear in the To Do List if Status values are defined at the Checklist level. If Status values are not defined for the checklist then the setup at institution-level determines which items to display. This option is applicable to items not set to Hide.

Checklist Table

Academic Institution WA171 Spokane CC
Checklist Code FINA1

Detail Find | View All First 1 of 1 Last

*Status Active

Active
Cancelled
Completed
Initiated
Notified
Ordered
Paid Off
Received
Returned
Second Notification
Waived
Notified

Financial Aid Student Record

Financial Aid

Due Days 14

Due Date

Tracking Group

Display in Self Service

Personalize | Find | First 1 of 1 Last

Item Code	Description	Default Due Date	Due Days	Hide	Communication Key
100	Emerg Cntc		14	<input type="checkbox"/>	

Personalize | Find | First 1-2 of 2 Last

Save Notify

Add Update/Display Include History Correct History

10. Select **Save** to save your work.

Checklist Table

Academic Institution WA171 Spokane CC
Checklist Code FINA1

Detail Find | View All First 1 of 1 Last

*Effective Date 07/09/2018 *Status Active

*Description Financial Aid Student Record

Short Description FA Stu Rec

*Function FINA Financial Aid

Checklist Type Medical

Due Days 14

Due Date

Tracking Group

Display in Self Service

Personalize | Find | First 1 of 1 Last

Sequence	Item Code	Description	Default Due Date	Due Days	Hide	Communication Key
100	CLEC00	Emerg Cntc		14	<input type="checkbox"/>	

Display Checklist Items

Personalize | Find | First 1-2 of 2 Last

*Item Status

Active

Notified

Save Notify

Add Update/Display Include History Correct History

Checklist 3C Group

i Use the **Checklist 3C Group** to grant security access to user groups in your database.

Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist 3C Groups

1. The Checklist 3C Group search page displays.

2. Enter the **Academic Institution**.
3. Enter the newly created **Checklist Code**.
4. Select the **Search** button.

Checklist 3C Groups

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Academic Institution

Checklist Code

Description

☐ Case Sensitive

Search [Basic Search](#)

5. The Checklist 3C Groups page displays.
6. Enter or look up the user **Group(s)** to work with this **Checklist Item**.
7. Select the **Add** button to add additional **Groups**.
8. Select **Save** to save your work.

Checklist 3C Groups

Academic Institution WA171 Spokane CC

Checklist Code FINA1 Financial Aid Student Record

Admin Function Financial Aid

Checklist Type Medical

Update/Inquiry Group

*Group	Description	
ADMA	Admissions 3C Group	<input type="button" value="-"/>
FAVO	FA View Only	<input type="button" value="-"/>

Add

Save

9. Process complete.