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

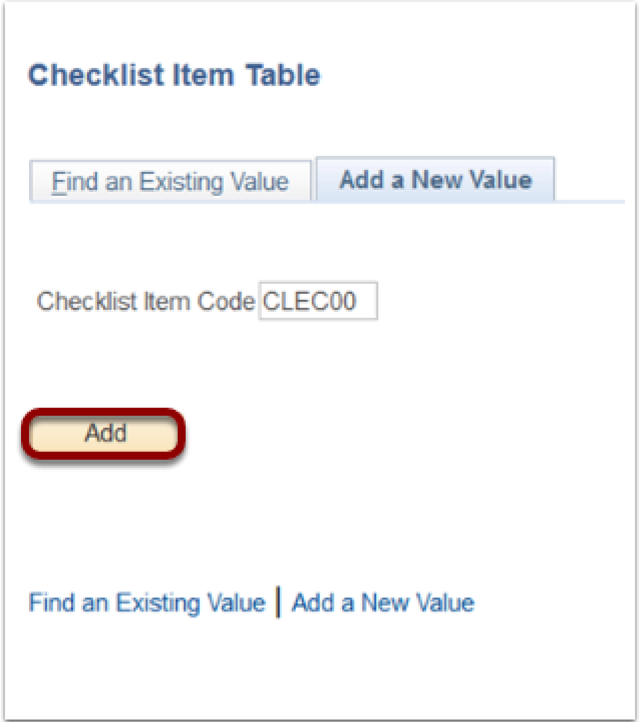
Checklist Item Table

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

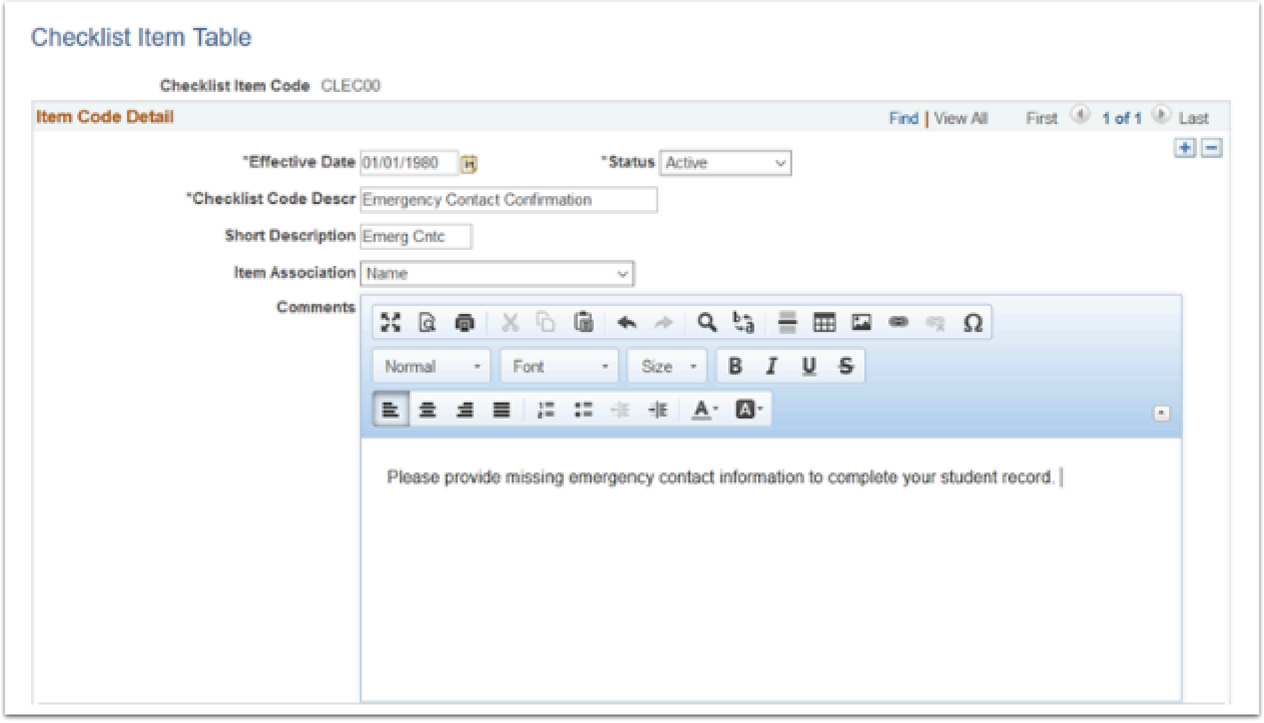
1. The Checklist Item Table search page displays.
2. Select the **Add a New Value** tab.
3. Enter the **Checklist Item Code** and select the **Add** button.

Note: Checklist item codes are institution specific.

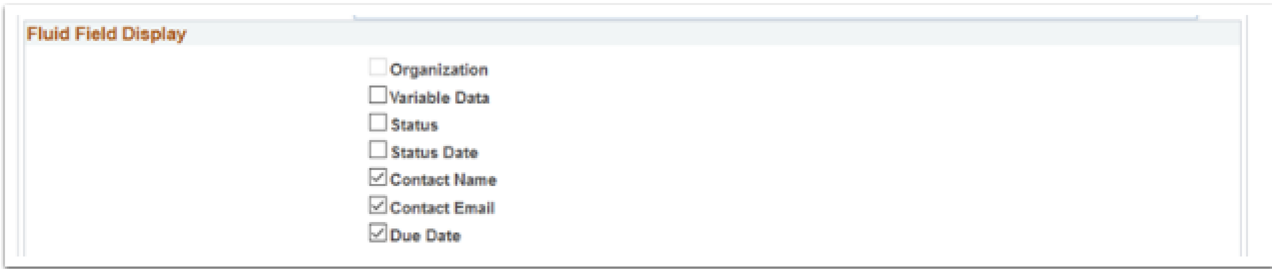


4. The Checklist Item Table page displays.
5. In the **Item Code Detail** section **-** Populate the following fields:
    a. **Effective Date** – date of checklist creation.
    b. **Status** – select the appropriate status – usually "Active."
    c. **Checklist Code Descr** – full text description.
    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.

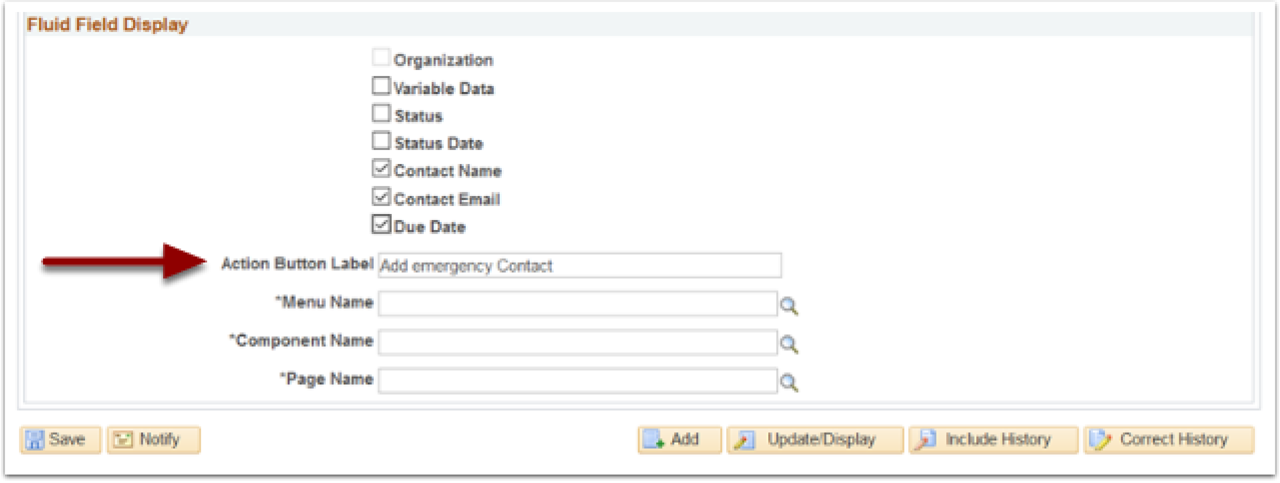
Note: Comments are viewable to students in the 'to do' list in Student Services Center.



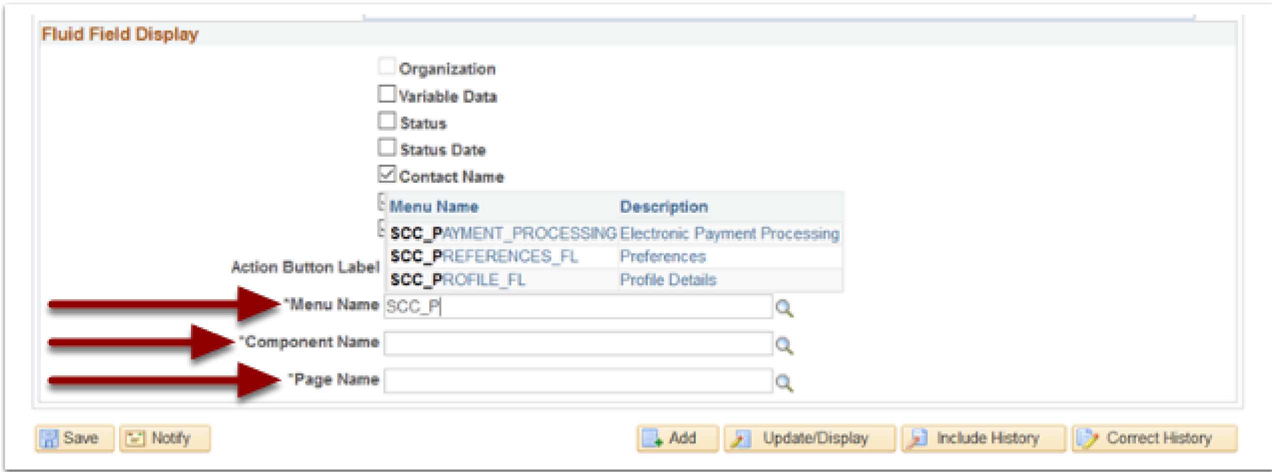
6. In the **Fluid Field Display** section - Set up these optional fields for the **Fluid** User Interface.
   a. **Checkboxes** - Select a checkbox to display the field on the **Task Details** page from **Person Checklist Item.**



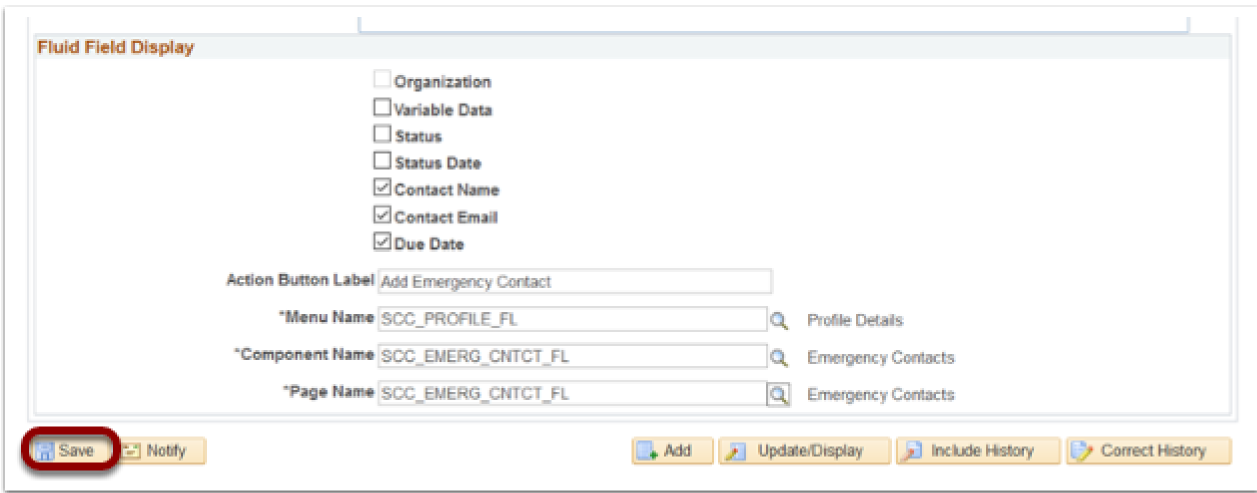
b. **Action Button Label** - Sets up a button in the **Hold Details** modal page to navigate to another **Fluid** self-service page. The label value has a maximum of 30 characters in order to avoid horizontal scrolling.



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.



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

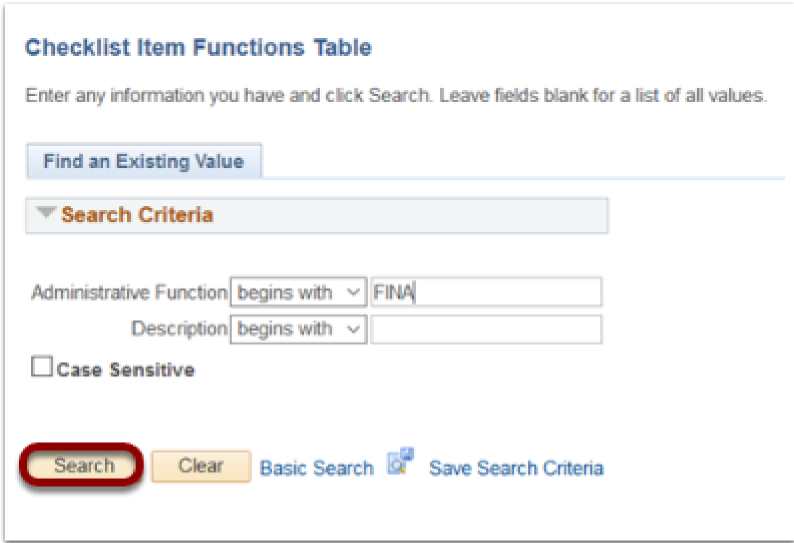


Checklist Item Functions Table

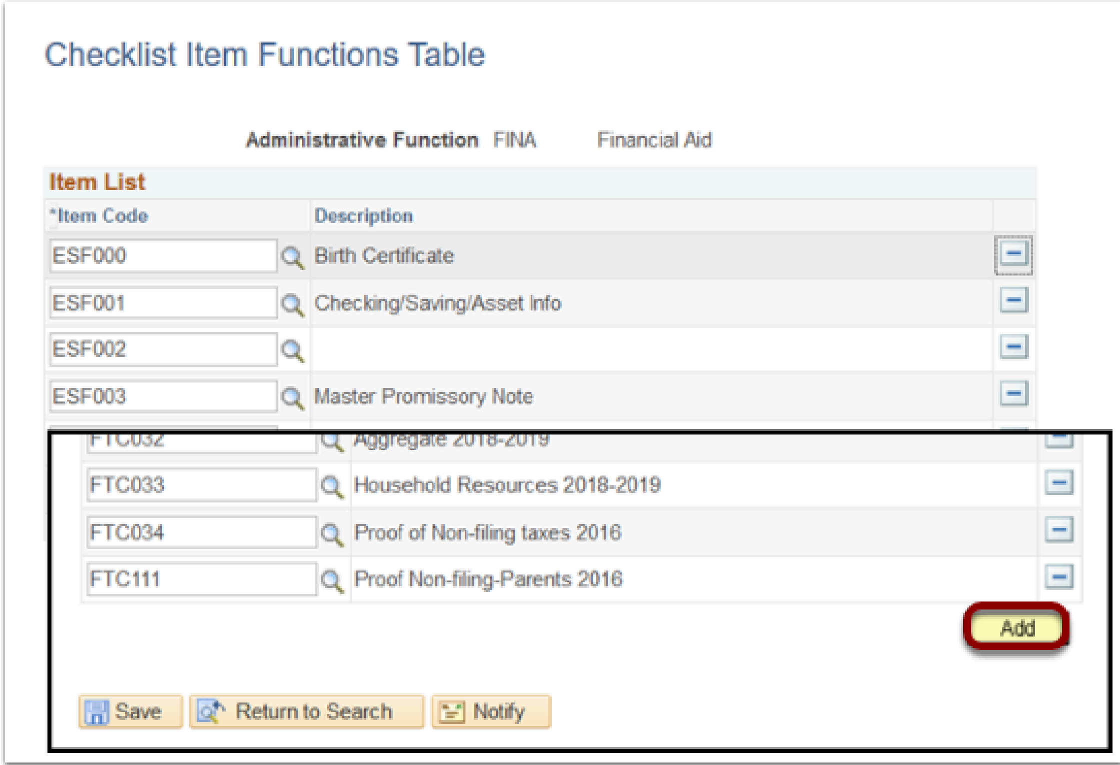
Use the **Checklist Item Functions Table** to associate Checklist Item(s) with **Administrative Function**(s). This will make the **Checklist Items** available for selection from the **Item Code** field on the **Checklist Table** page.

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**.

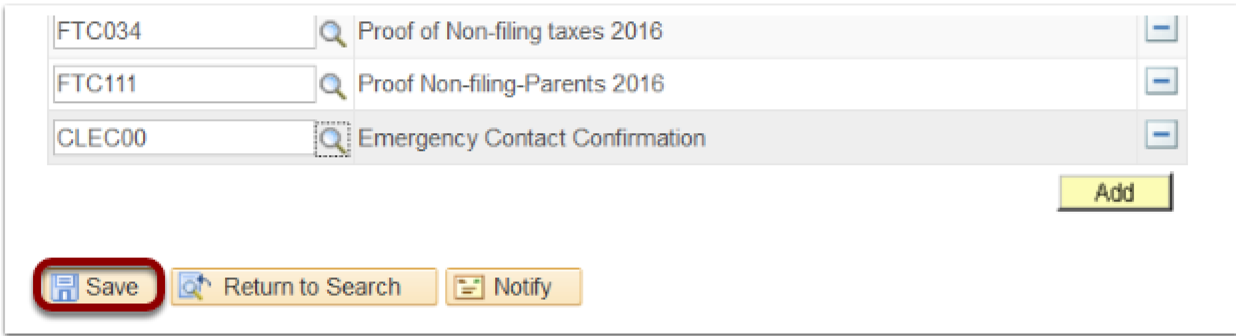


4. The Checklist Item Functions Table page displays.
5. Scroll to the bottom of the page and select **Add**.



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

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

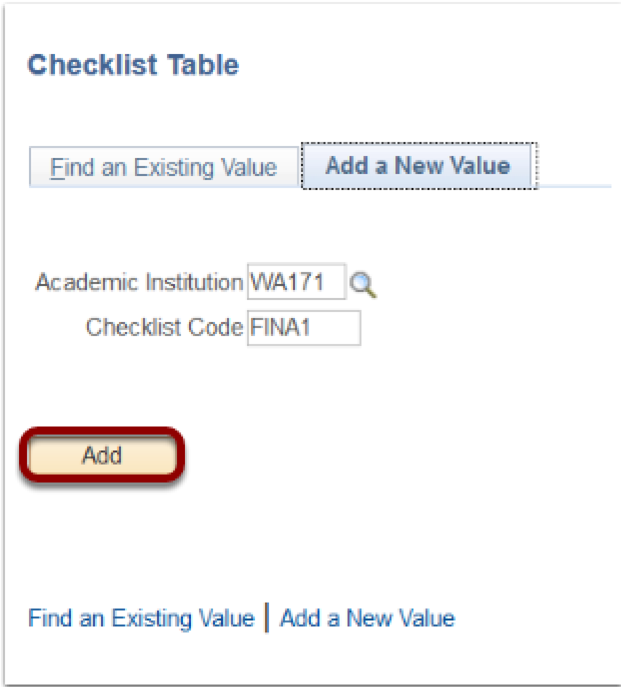


Checklist Table

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

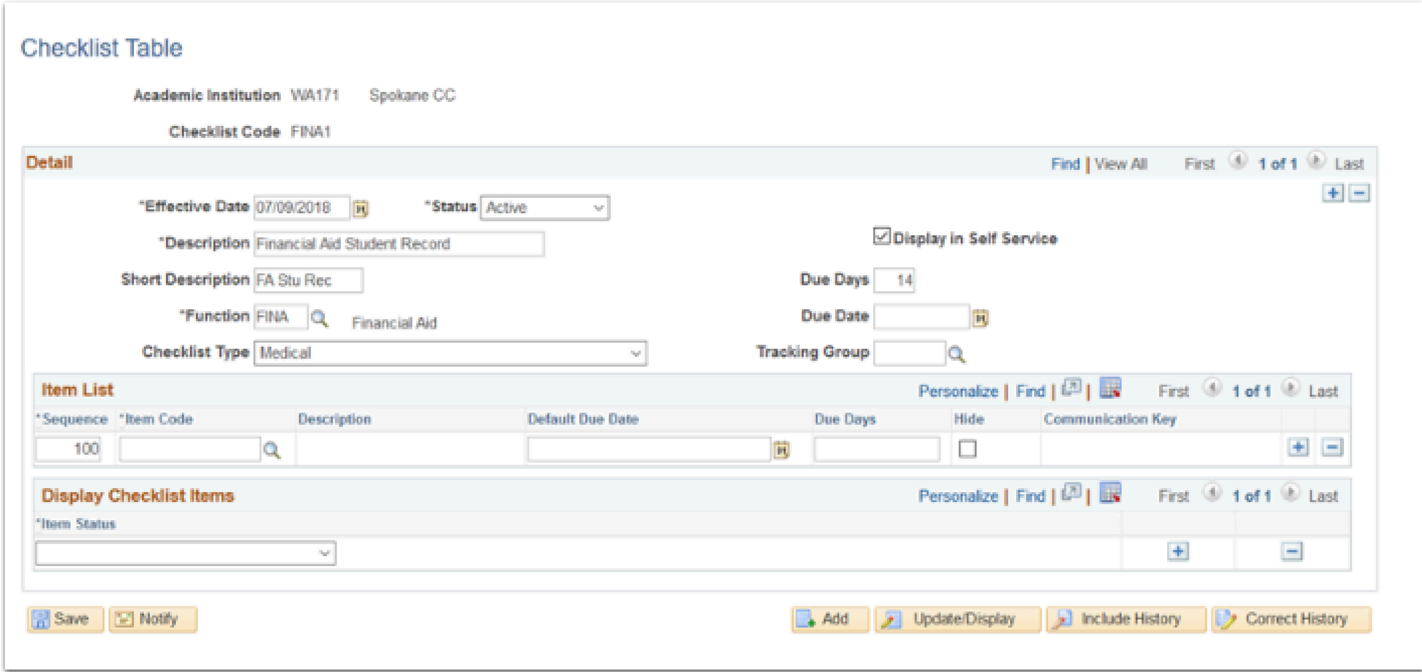
Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist Table

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**.

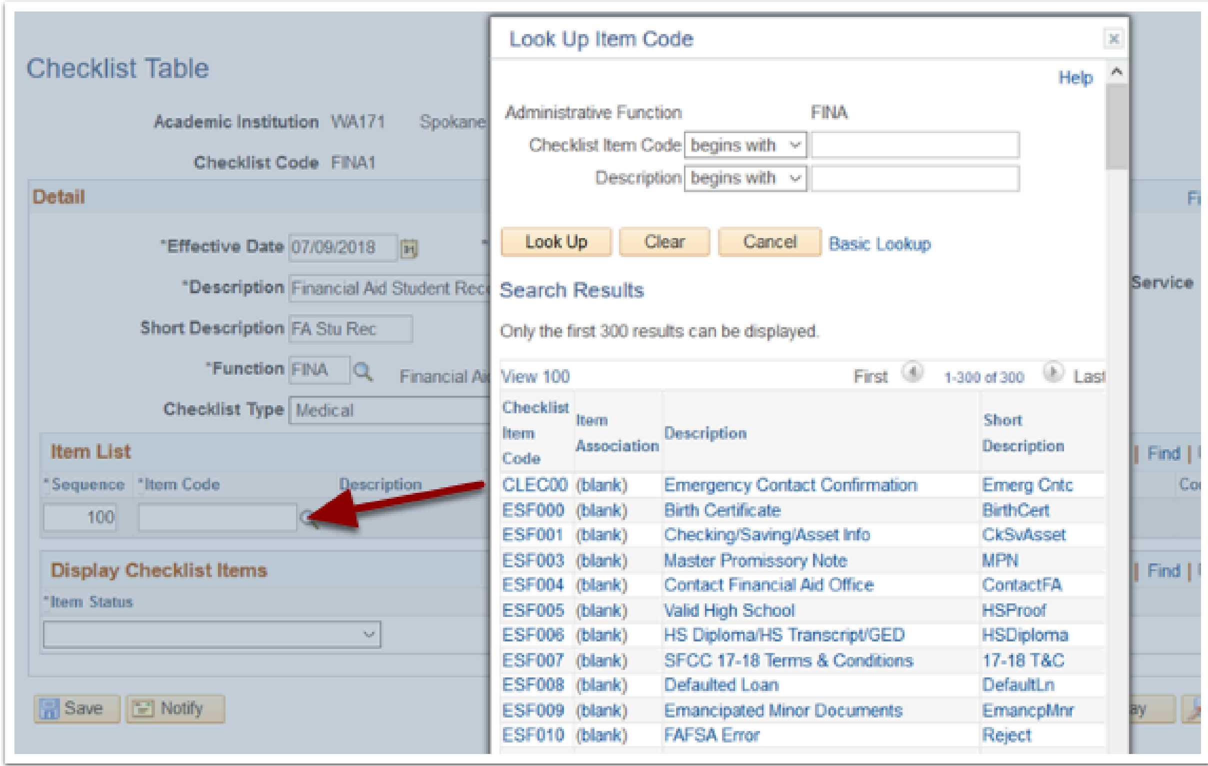


7. In the **Detail** section of the **Checklist Table** page, populate the following fields:
   a. **Effective Date** – date of the checklist creation.
   b. **Description** – enter a description that matches the description created in the previous section.
   c. **Short Description** – enter a short 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.



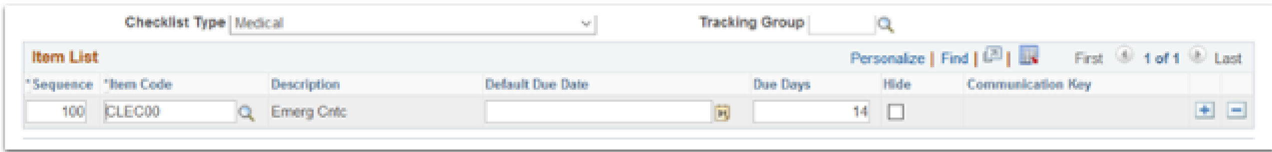
8. In the **Item List** section populate the following fields:
   a. **Sequence** – the appropriate **Sequence** number (Currently SBCTC is using 100 for all checklist items).
   b. **Item Code** – enter or use the lookup tool to select the **Item Code** for the **Checklist** created.



c. **Default Due Date** – SBCTC is not using default due dates at this time.

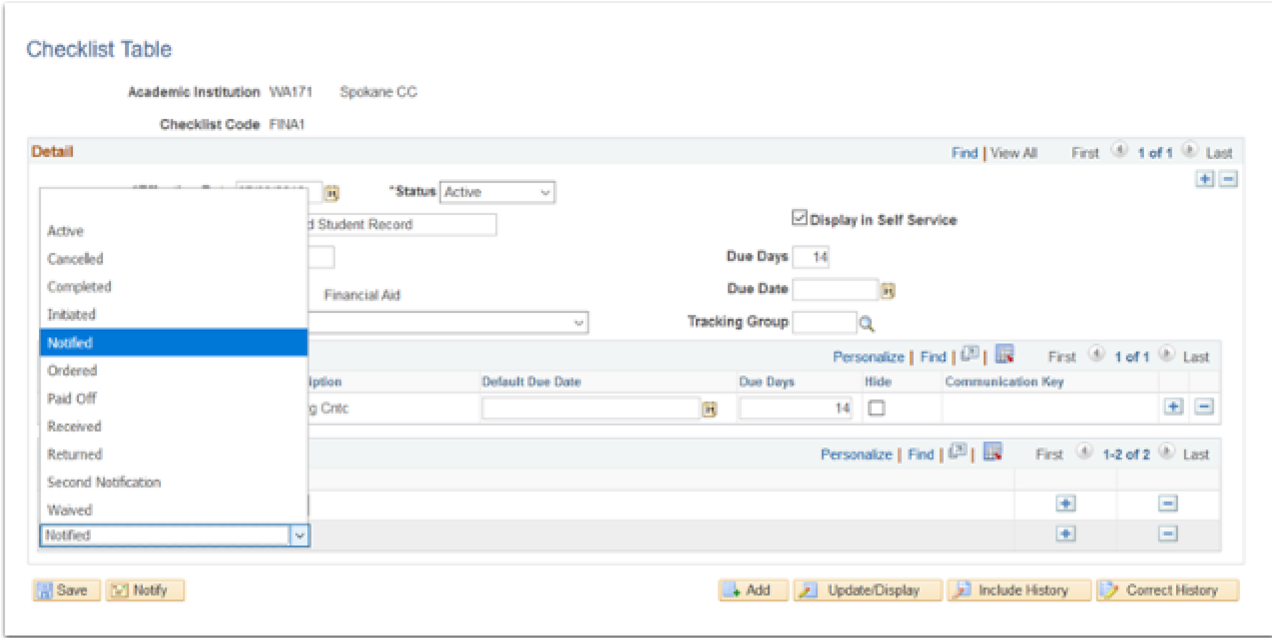
d. **Due Days** – enter the **Due Days** from the **Detail** section in the previous step.

e. **Comm Key** – SBCTC is not using **Communication Key** at this time.

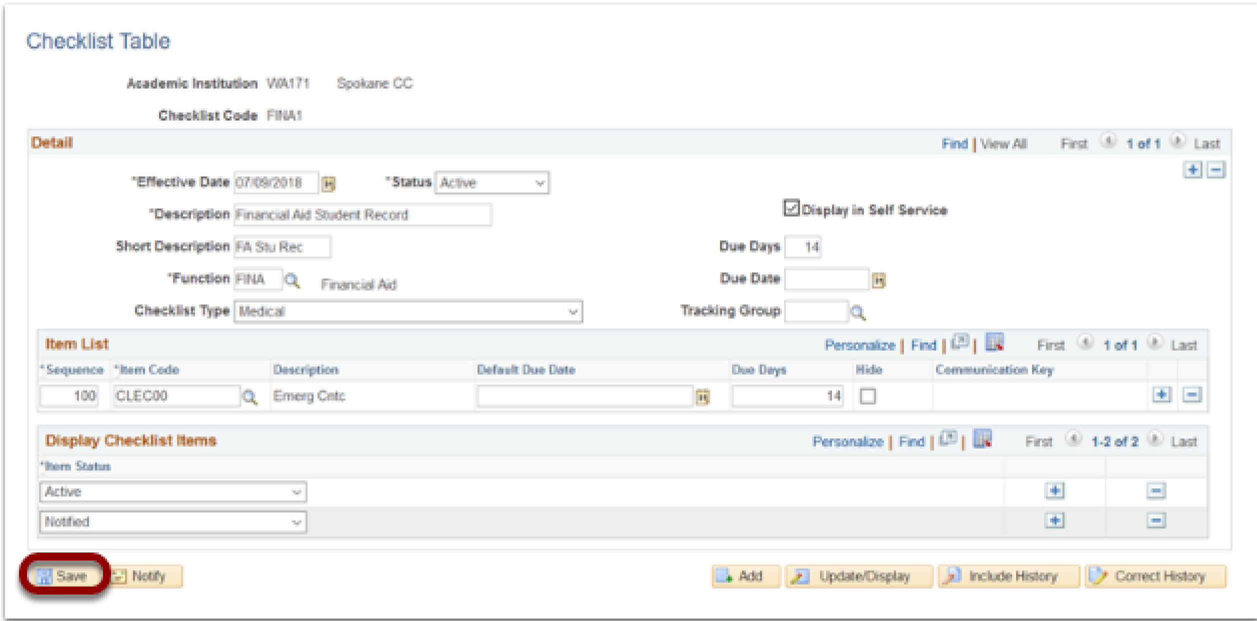


9. **Display Checklist** section is only used for the **Fluid User Interface**.
   a. The grid only appears if the **Display in Self Service** check box in the **Detail Section** is selected.
   b. Select **Item Status** value(s) from the drop down lists.

> 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.



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



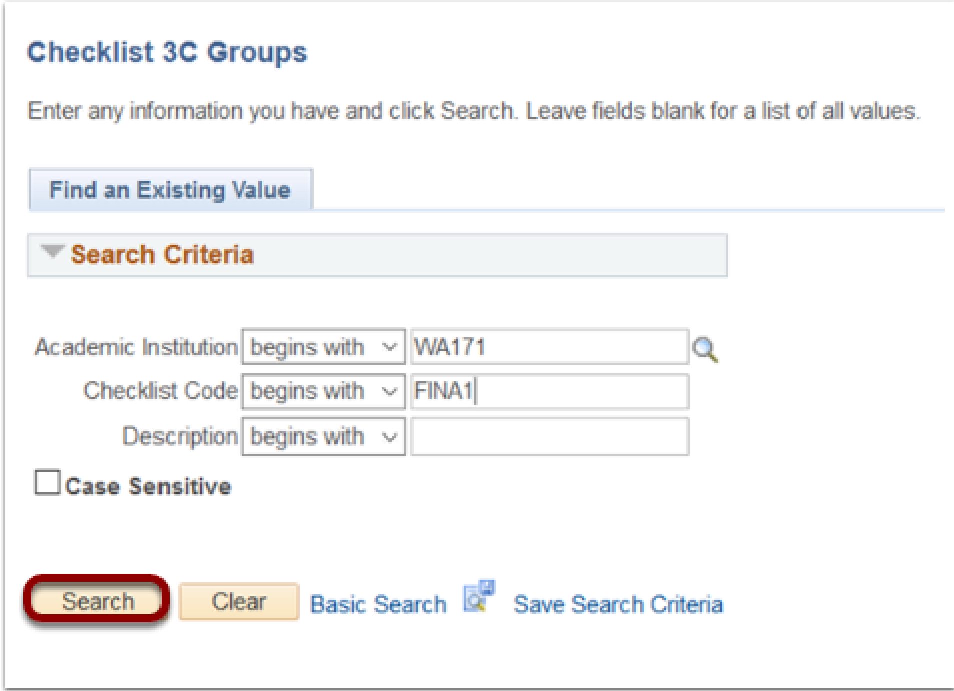
Checklist 3C Group

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

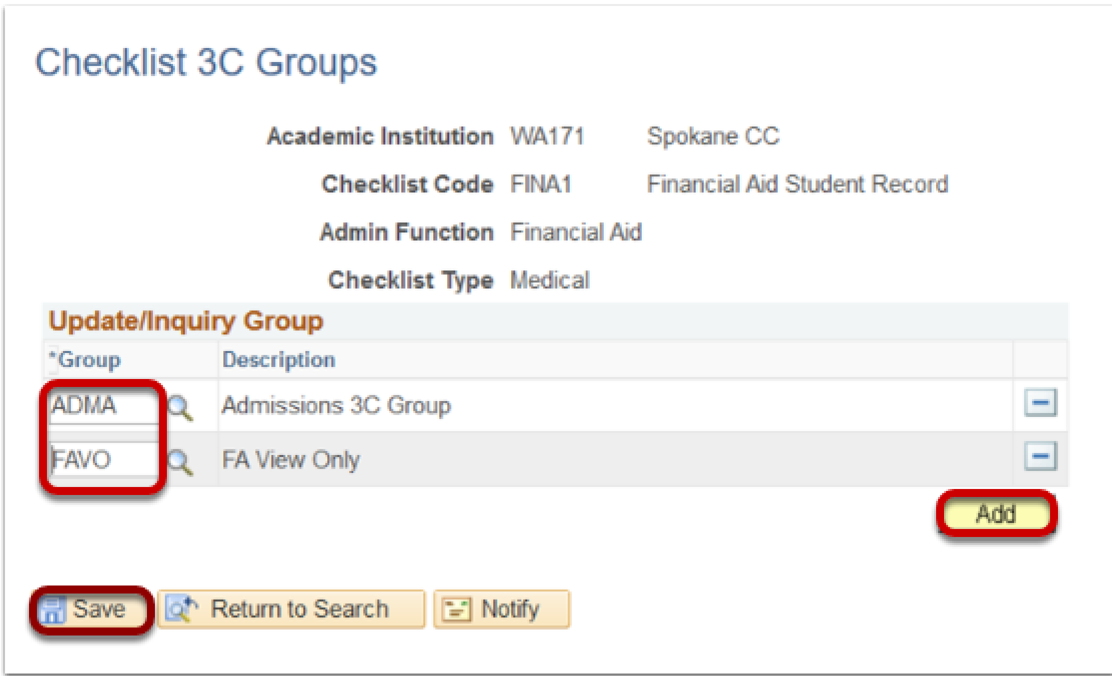
Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist 3C Groups

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.



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.



9. Process complete.