Checklist Management – Person

Background
- The Checklist is used to track the progress/completion of a specific item. It will appear in the Student Center To Do List and serve as a reminder to the student they have a task to complete.

Navigation
- Campus Community – Checklists – Person Checklists – Checklist Management-Person

Checklist Management 1 tab Page Fields (refers to overall checklist)
- Checklist Date Time – Date and time at which the checklist was created/updated.
- *Administrative Function – The code for the functional area with which this checklist is associated. If this page is accessed from another page, the system automatically displays the administrative function from that page.
- *Academic Institution – The Ohio State University
- *Checklist Code – The code that describes the checklist assigned to this individual. The only checklist codes available are those associated with the administrative function.
- *Status – “Initiated” or “Completed”. Completed will remove the checklist item from the Student Center “To Do” list.
- Status Date – The date when the status was created.
- Due Date – The date the item should be completed (optional).
- Due Amount – The monetary amount, if any, due as a part of this checklist.
- Comments – Notes may be added to further identify or describe the checklist for this student.

Special Note – Once a checklist is initiated (saved) it cannot be deleted. The Status should be updated appropriately to remove it from the Student Center To Do List.
Checklist Management 2 tab Page Fields (refers to items on checklist)

- **Sequence** – The number of this checklist item in the list of checklist items for this student. The system automatically enters the next sequential number for each checklist item that is added. You can manually override the number to reorder the list of items for this checklist.

- **Item** – The code for this checklist item. The available item codes are limited to the administrative function and checklist code selected.

- **Status** – Indicates the standing of the checklist item. Note that marking an item “Completed” or “Waived” on this page will not automatically mark the item completed on the first page. To “Complete a checklist item, it must be marked “Completed” on the Checklist Management 1 tab.
  - 2nd Ntfctn – Second notification regarding the checklist to the student
  - Active – Item is currently in progress. (Displays in Self Service = Yes)
  - Cancelled – Item posted in error (either batch or manually). (Displays in Self Service = No)
  - Completed – Item is finished and should be removed from the student’s To Do List. (Displays in Self Service = No)
  - Initiated – Item was posted to student’s To Do List. (Displays in Self Service = Yes)
  - Notified – Communication has been sent to student regarding TAP requirement. (Displays in Self Service = Yes)
  - Ordered – Not used in conjunction with the TAP. (Displays in Self Service = Yes)
  - Paid Off – Not used in conjunction with the TAP. (Displays in Self Service = No)
  - Received – Not used in conjunction with the TAP. (Displays in Self Service = Yes)
  - Returned – Not used in conjunction with the TAP. (Displays in Self Service = Yes)
  - Waived – TAP not required. (Displays in Self Service = No)

- **Status Date** – The date the checklist item was created or updated.
- **Due Date** – The date the item should be completed (optional).
- **Postmark Date** – The date the envelope was date stamped, if applicable.
- **Responsible ID** – The ID of the user who created the checklist on the Checklist page. This ID number can be manually overridden to reassign responsibility to another user.
- **Name** – The name of the person assigned to the Responsible ID.
- **Comment** – Notes may be added to further identify or describe the checklist for this student. Notes display in the Student Center To Do List details (example below).