



Checklists

Checklists are items you assign to applications (or cases) that students must complete before you can make a decision or move them to the next stage.

They keep your process organized and make expectations clear for both your team and your students.

Checklists are customizable, easy to display in the student portal, and can be used at any stage of the student journey.



DIFFICULTY
Beginner



ESTIMATED TIME
6 minutes



CATEGORY
Process Management



1. Why this matters

Checklists set clear expectations for students.

They help you collect what you need, when you need it.

They reduce back-and-forth, speed up reviews, and help you make decisions with confidence.

Happy students = clear checklist + clear communication.



2. Think of it like...

Checklists are like a “to-do list” for a journey.

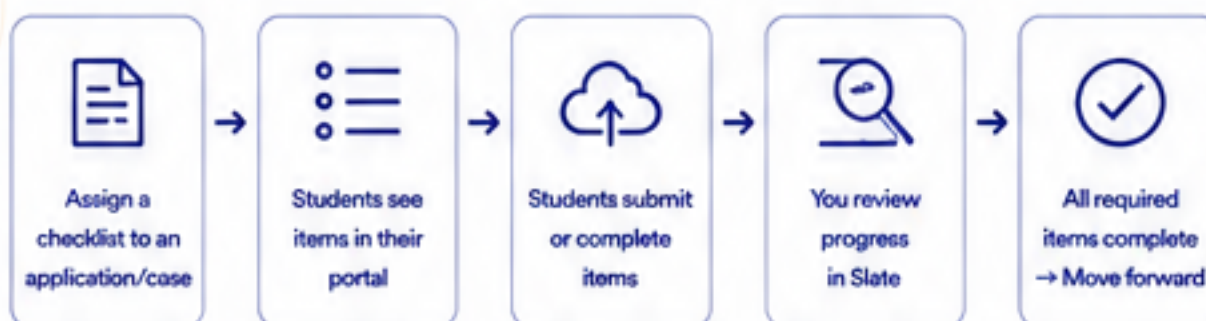
Students complete each item to reach the next step.

You can see what's done, what's in progress, and what's still needed.



3. The Big Picture

- Checklists connect your process, your team, and your students.



Result: Everyone knows what's needed, what's next, and where the student stands.



4. Common Misconceptions

- Checklists are only for admissions. (They can be used at any stage of the student journey.)
- Students won't see the checklist. (Display in the portal so they always know what's needed.)
- Items must be completed in order. (Students can usually complete items in any order unless you set it up that way.)
- Once a checklist is assigned, it can't change. (You can always update templates and items.)
- Checklists are only for document uploads. (Items can be uploads, forms, acknowledgments, tasks, or simple next steps.)



5. Key Takeaways

- Checklists show students what to do next.
- They help you collect what you need before making decisions.
- They are customizable and reusable.
- Display them in the portal so students stay informed.
- Use checklists beyond admissions to guide the entire journey.
- Clear checklists lead to a better student experience and a smoother process for your team.



What Are They Used For?

Admissions Examples:

- ✓ Application Requirements
- ✓ Transcripts
- ✓ Test Scores
- ✓ Recommendations
- ✓ Essays
- ✓ Immunization Records
- ✓ And more!

Beyond Admissions Examples:

- ✓ Submit a deposit
- ✓ Complete FAFSA
- ✓ Attend orientation
- ✓ Submit housing application
- ✓ Register for classes
- ✓ And more!



Checklist Features

- ✉ Create custom checklist templates
- ✓ Add items and instructions
- ✓ Set items as required or optional
- ✓ Track status in real time
- ✉ Display in student portal
- 👤 Students can upload or complete items
- 🔔 Receive notifications and reminders
- 📝 Use in multiple stages of the process



Best Practices

- ✓ Keep checklist names clear and consistent.
- ✓ Write item names students will understand.
- ✓ Provide clear instructions for each item.
- ✓ Use required items for what's essential.
- ✓ Review and update regularly.
- ✓ Display in portal early and often.
- ✓ Use checklists to drive the next step.



Next Concepts

- ➔ Materials
- ➔ Decisions
- ➔ Portals
- ➔ Workflows
- ➔ Events

