

# Checklist

## What is the Checklist?

The Checklist outlines the next steps and timeline for prospective students relating to the term they intend to transfer.

#### **Feature Overview**

To add a new Checklist item, click **Site Setup > Check Mark symbol on the left-hand side of the screen.** 

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Then click on the Add Row button, located aboved the Checklist table.

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Once you've added a new row, **then click on the hamburger icon** next to the next Checklist item and click on **Edit.** Once you've clicked on Edit, then you'll be able to update the Checklist item. Once you're done, click on submit.

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A form with all required fields needs to be completed to add a Checklist item.

- **Title:** Enter the desired name of your Checklist item. You cannot link to other websites in Checklist item titles.
- **Order:** Choose the position in which you want this item to appear in the Checklist.
- **Body**: No limit to characters that can be added to this section. As you type, content will populate in real time in the Preview to the right of the Content block.
- **Button label** (Optional): Checklist allows an institution to link to the call to action of any given Checklist item. Keep the button label succinct and specific. If you choose to add a button to a Checklist item, it will be right-justified and blue in color.
- **Button URL** (Optional): Copy and paste the destination URL for the call to action the button label references. By default, when this button is clicked by a student, it opens a new window.

A brand-new Checklist item will automatically display at the bottom of the existing Checklist. To delete a Checklist item, hover over the Checklist item and click the **X button** in the top right corner. This will automatically populate a message requiring confirmation to delete that item.

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EAB Best Practice
Customize your Checklist to reflect your institution's key steps in the admission process but try to limit the quantity of steps to around <b>8 Checklist items</b> .

To delete a checklist item, you can select the checkbox next to the checklist item(s) or select all of the items at once. Then the **Delete button** will appear at the top left on the table.

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### **Frequently Asked Questions**

- 1. How often should I update the Checklist?
  - We recommend reviewing the Checklist on an annual basis or as new student steps or onboarding process changes.

#### **Related articles**

- 1. Terms
- 2. Student Profile
- 3. Campus Resources