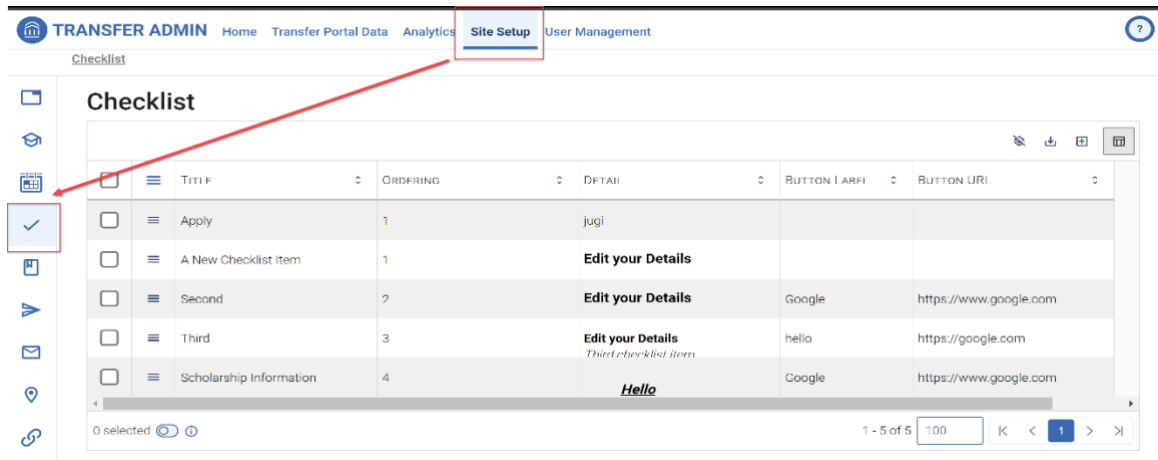# Checklist

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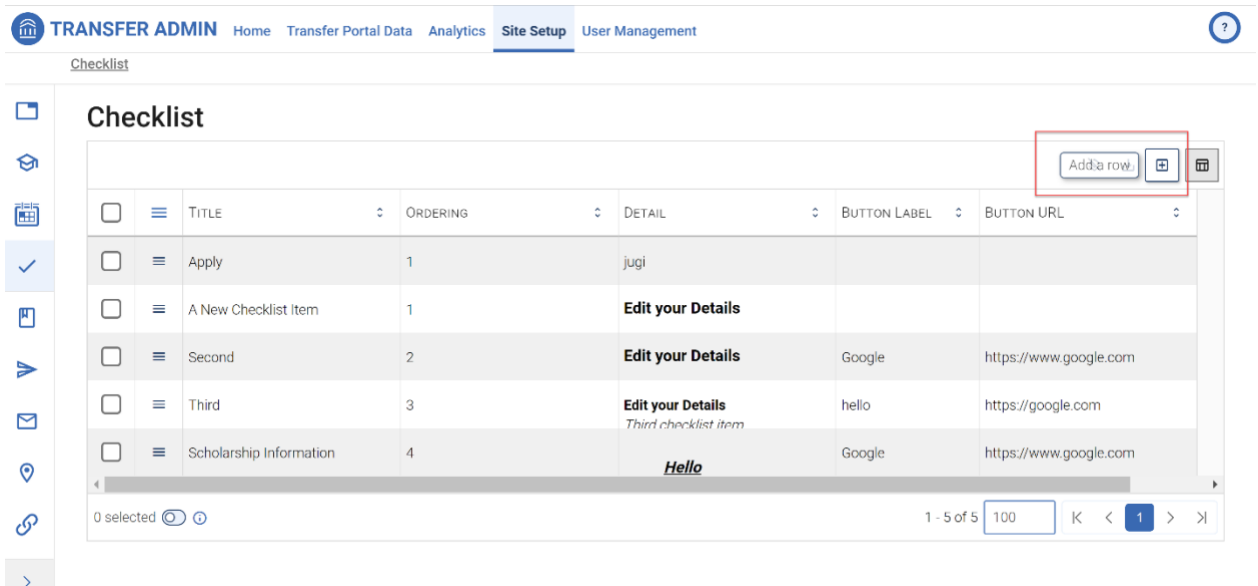
Then click on the **Add Row button,** located aboved the Checklist table.

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.

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.

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 **8 Checklist items**.

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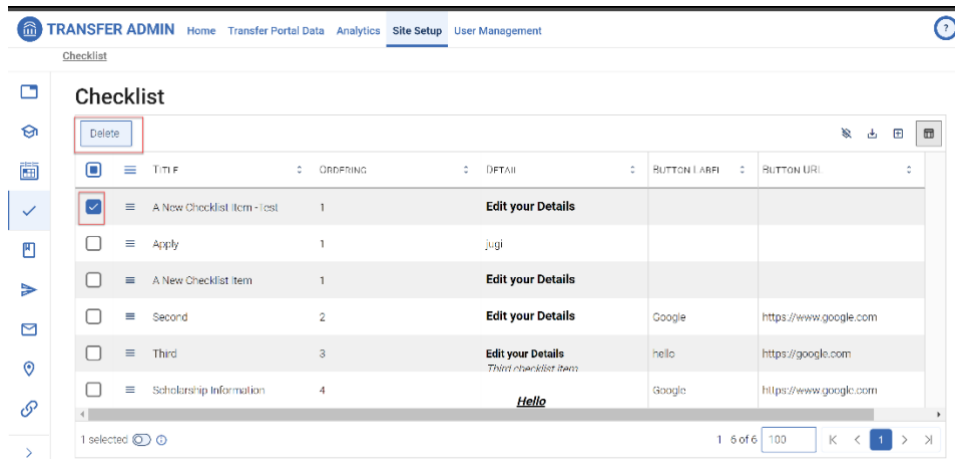
Frequently Asked Questions
1. How often should I update the Checklist?
   - We recommend reviewing the Checklist on an annual basis or as new student steps or onboarding process changes.

Related articles
1. Terms
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