



Washington State Board for Community and
Technical Colleges





Rollover Non ISIR Related Checklists in Completed Status from Prior Year

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Rollover Non ISIR Related Checklists in Completed Status from Prior Year

Steps for Preparing Rollover Checklist Process

1. Identify Rollover Checklists

Navigation	Description
Reporting Tools > Query > Query Viewer	Discover which checklists to include

Run the following query and download the results to Excel:

CTC_FA_LC_AYRO_CHECKLIST_ITEMS

CTC_FA_LC_AYRO_CHECKLIST_ITEMS - Checklist Items & Funct Table

Institution

[View Results](#)

Row	Institution	Descr	Function	Chklist Itm	Eff Date	Status	Item Associatio	Descr	Short Desc	Long Descr	Descr
-----	-------------	-------	----------	-------------	----------	--------	-----------------	-------	------------	------------	-------

Note on your spreadsheet the checklists that are NOT generated by ISIRs that you want to roll over in *Completed* status from prior year to current year.



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

2. Discover Prior Year Checklists Status

Navigation	Description
Reporting Tools > Query > Query Viewer	Review checklist and their status codes

Run the following query with only the Institution, Aid Year and Checklist prompts filled out:

CTC_FA_CHECKLIST_LIST

CTC_FA_CHECKLIST_LIST - List prompted by chklist/aidyr

Institution

Aid Yr

Checklist

Term (Optional)

Responsible ID (Optional)

View Results

Row	ID	NID	Name	Aid Yr	Checklist	Descr	Status	Checklist Comment	TERM	Resp ID
-----	----	-----	------	--------	-----------	-------	--------	-------------------	------	---------

Note whether the status used was *Waived* or *Completed* in the previous aid year for the checklist so that you know the parameters for the assignment query in a future step.



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

3. Discover Which Event IDs Need to Be Created

Navigation	Description
Reporting Tools > Query > Query Viewer	Review checklist and their status codes

Run the following query and download the results to Excel:

CTC_FA_LC_AYRO_3CEVENT_DEFINED

CTC_FA_LC_AYRO_3CEVENT_DEFINED - Event Definitions

Institution

[View Results](#)

Row	Institution	Descr	Institution	Event ID	Eff Date	Status	Descr	Short Desc	Function	User Select
-----	-------------	-------	-------------	----------	----------	--------	-------	------------	----------	-------------

Note which checklist already has an *Initiated* and *Completed* **Event Definition ID** that can be used for the rollover process.

The 10th position of the **Event ID** indicates the status the **Event ID** places for the checklist

FISxxxxxI = Initiated status Event ID

FISxxxxxC = Completed status Event ID



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

4. Create Initiated and Completed Event IDs

Navigation	Description
Campus Community > 3C Engine > Set Up 3C Engine > Event Definition	Building Event Definitions for checklists that will be part of rollover

Note: Some Event Definitions already exist that can be used during the rollover process identified in the previous step. You **DO NOT** want to create a new Event ID for those checklist items and checklist status if they exist.

Select **Add a New Value** and enter your **Academic Institution** and new **Event ID**

Event ID naming convention

- 1st position always = 'F'
- 2nd & 3rd position = 'IS'
- 4th – 9th position = checklist item (ex: ELW083)
- 10th position = status ('C' or 'I') of Event ID Definition (ex: if Event ID is used to complete a checklist item, then the 10th position should be 'C')

Event Definition

[Find an Existing Value](#) [Add a New Value](#)

Academic Institution

Event ID

Add

[Find an Existing Value](#) | [Add a New Value](#)

Complete the *Event Details* and *Checklist* section accordingly



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

Event Detail for Initiated Event ID

Enter the following:

- Description (A best practice is to devise a description that will enable users to identify the Event ID as a “Rollover Checklist Item”. First position should match the value in the last position of the Event ID created above, followed by ‘R’.)
- Short Description
- Function (Note – All Rollover Checklist Items need to be FINA)

Checklists

- Enter the Checklist Code then the Seq, Item Code, Item Status and Due Days should auto-populate
- Update Responsible ID field with your FA Office ID

Select the **Detail** link to update the Responsible ID on the *Checklist Detail* page, select **OK** then **Save**

Academic Institution Lake Washington Inst. of Tech.
Event ID FISELW083I

Event Detail Find | View All First 1 of 1 Last

*Effective Date 05/28/2025
*Description IR-Dual Program Declaration
*Short Description IR-DualPrg
*Function FINA Financial Aid
*Status Active
☐ User Selection
Variable Data Joint Rules

Communications
Communication Key
Detail

Comments
*Comment Category
Detail

Checklists
*Checklist Code ELW083 Dual Program Declaration
Detail ☐ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	ELW083	Dual Prog	202844747	Initiated		21	

Save Return to Search Notify Add Update/Display Include History Correct History



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

Checklist Detail

Default Due Date			Due Days	21	
Due Amount			Currency		
Responsible ID	202844747		Financial Aid Office, LWTech		
Tracking Group					
Comments					

Event Detail for Completed Event ID

Enter the following:

- Description (A best practice is to devise a description that will enable users to identify the Event ID as a “Rollover Checklist Item”. First position should match the value in the last position of the Event ID created above, followed by ‘R’.)
- Short Description
- Function (Note – All Rollover Checklist Items need to be FINA)

Checklists

- Enter the Checklist Code then the Seq, Item Code, Item Status and Due Days should auto-populate
- Update the *Item Status* to Completed
- Select **Update Status** box
- Update Responsible ID field with your FA Office ID

Select the **Detail** link to update the Responsible ID on the *Checklist Detail* page, select **OK** then **Save**



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

Academic Institution Lake Washington Inst. of Tech.

Event ID FISELW083C

Event Detail Find | View All First 1 of 1 Last

*Effective Date 05/28/2025

*Description CR-Dual Program Declaration

*Short Description CR-DualPrg

*Function FINA Financial Aid

*Status Active

☐ User Selection

Variable Data Joint Rules

Communications

Communication Key Detail

Comments

*Comment Category Detail

Checklists

*Checklist Code ELW083 Dual Program Declaration Detail ☒ Update Status

Checklist Item Details

*Seq	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Communication Speed Key
100	ELW083	Dual Prog	202844747	Completed		21	

Save Return to Search Notify

Add Update/Display Include History Correct History

Checklist Detail

Default Due Date

Due Days 21

Due Amount

Currency

Tracking Group

Responsible ID 202844747

Financial Aid Office,LWTech

Comments

OK Cancel



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

5. Add 3C Groups to Each Newly Created Event ID

Navigation	Description
Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups	Adding 3C Groups for use in processing

For each new **Event ID** created in the steps above, you must configure an **Event 3C Groups** page.

Enter the **Event Definition** then select **Search**

Add two more rows to have a total of three rows and enter the following three Groups then select Save:

- o FASU
- o FAVO
- o FAVU

Event 3C Groups

Academic Institution	WA260	Lake Washington Inst. of Tech.
Event ID	FISELW083C	RC-Dual Program Declaration
Function	Financial Aid	

Update/Inquiry Group

*Group	Description		
FASU	FA Super User	+	-
FAVO	FA View Only	+	-
FAVU	FA View Update	+	-

Save Return to Search Notify Refresh



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

Run the Rollover Checklist Process

1. Run the Initiated Event ID

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Assigning checklist items in Initiated from previous aid year to a future aid year.

Enter New Run Control ID

Process 3C's

- Select the **Population Selection** box

Event Selection

- Enter your Academic Institution
- Enter 'FINA' for Administrative Function
- Select the 'IR' (Initiated Rollover) Event ID

Population Selection

- Select PS Query for the Selection Tool
- Query Name = **CTC_FA_SB_ROLLOVER_CHK**
- Edit Prompts:
 - Target Aid Year is the Aid Year where the checklist will be assigned to
 - Institution
 - Chklst Item to be copied
 - Previous AY Chklst Status = Completed
 - Target AY Chklst Status = Completed
- Select **Preview Selection** and choose a student or students to review.

Example Run Control ID for Initiating ELW083



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

NEW V1

3C Engine Parameters

Manage Duplicate Assignment

Run Control ID WA260_OY_ASSIGN_ELW083_DE

[Report Manager](#)

[Process Monitor](#)

[Run](#)

Process 3Cs

- ☒ Population Selection
- ☐ Trigger Table
- ☐ Mass Change

Process Joint Records

- ☒ No Joint Processing
- ☐ Yes, all Joint IDs
- ☐ Yes, if match exists

Event Selection

Academic Institution WA260 Lake Washington Inst. of Tech.
Administrative Function FINA Financial Aid
Event ID FISELW083I IR-Dual Program Declaration

[Detail](#)

Communication Key

Checklist Code

ELW083 Dual Program Declaration

Checklist Item

100 ELW083 Dual Program Declaration

Comment Category

Population Selection

Selection Tool PS Query
Query Name CTC_FA_SB_ROLLOVER_CHK

[Edit Prompts](#)

[Launch Query Manager](#)

[Preview Selection Results](#)

[Save](#)

[Notify](#)

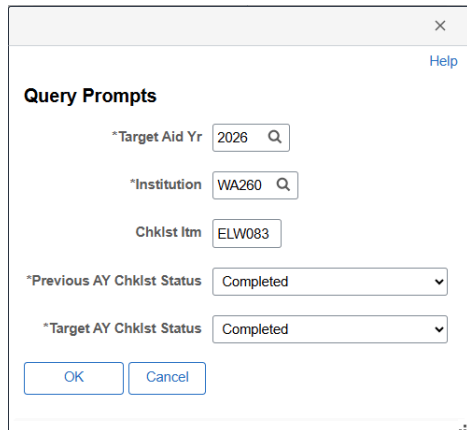
[Add](#)

[Upd](#)

3C Engine Parameters | [Manage Duplicate Assignment](#)

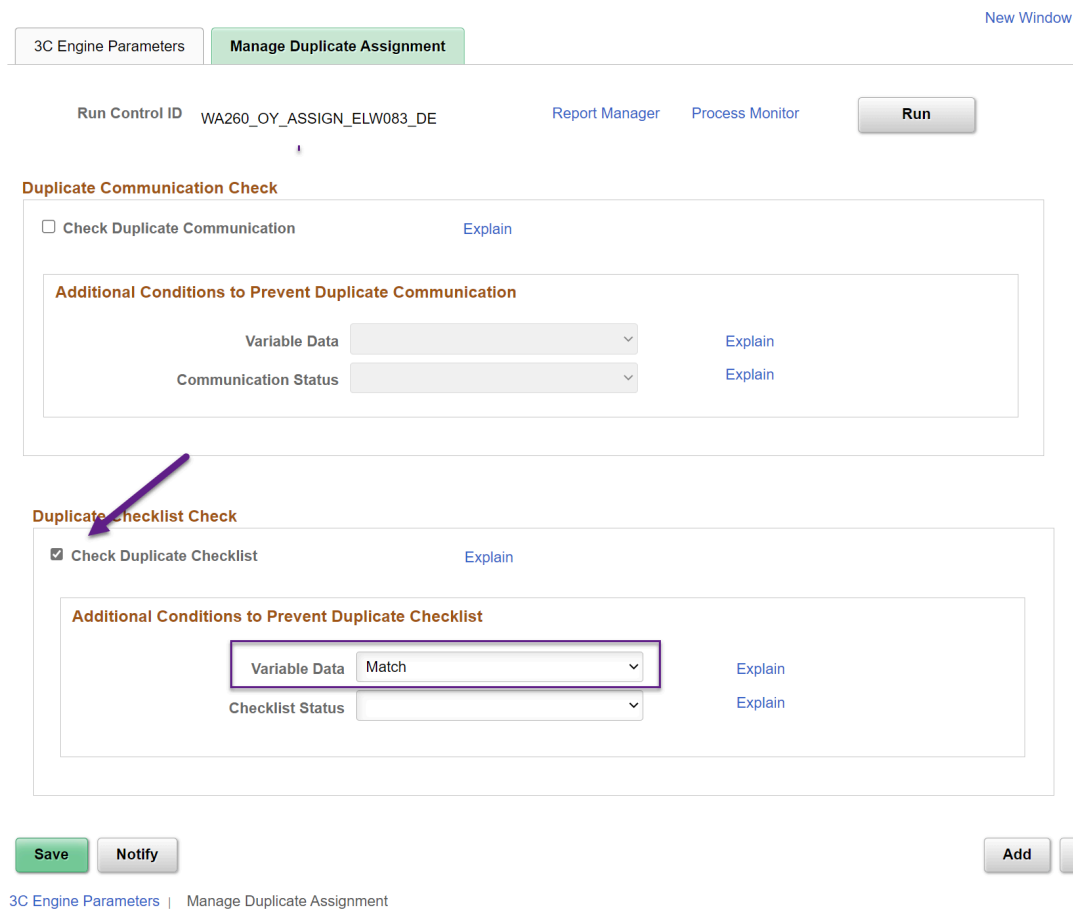


Rollover Non ISIR Related Checklists in Completed Status from Prior Year



A dialog box titled "Query Prompts" with a close button (X) and a "Help" link. It contains several input fields: "*Target Aid Yr" with a text box containing "2026" and a search icon; "*Institution" with a text box containing "WA260" and a search icon; "Chklist Itm" with a text box containing "ELW083"; "*Previous AY Chklist Status" with a dropdown menu showing "Completed"; and "*Target AY Chklist Status" with a dropdown menu showing "Completed". At the bottom are "OK" and "Cancel" buttons.

To ensure that the process will ONLY assign if the student does not already have the checklist in Completed status for the target aid year, the Duplicate Checklist box MUST be checked, and the Variable Data field MUST be populated with "Match."



The "Manage Duplicate Assignment" interface. At the top, there are tabs for "3C Engine Parameters" and "Manage Duplicate Assignment" (which is active). A "New Window" link is on the right. Below the tabs, the "Run Control ID" is "WA260_OY_ASSIGN_ELW083_DE". There are links for "Report Manager" and "Process Monitor", and a "Run" button. The main section is titled "Duplicate Communication Check" and contains a checkbox for "Check Duplicate Communication" (unchecked) and an "Explain" link. Below this is a box titled "Additional Conditions to Prevent Duplicate Communication" with two dropdowns: "Variable Data" and "Communication Status", each with an "Explain" link. A purple arrow points from this section down to the "Duplicate Checklist Check" section. The "Duplicate Checklist Check" section has a checkbox for "Check Duplicate Checklist" (checked) and an "Explain" link. Below it is a box titled "Additional Conditions to Prevent Duplicate Checklist" with two dropdowns: "Variable Data" (set to "Match") and "Checklist Status", each with an "Explain" link. At the bottom are "Save", "Notify", and "Add" buttons. A footer bar shows "3C Engine Parameters | Manage Duplicate Assignment".

Once the process runs to Success and Posted review the checklist status of the student/students from the preview selection.



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

2. Run the Completed Event ID

Navigation	Description
Campus Community > 3C Engine > Run 3C Engine	Flipping the checklist items assigned in the previous set to Completed.

Enter New Run Control ID

Process 3C's

- Select the **Population Selection** box

Event Selection

- Enter your Academic Institution
- Enter 'FINA' for Administrative Function
- Select the 'CR' (Initiated Rollover) Event ID

Population Selection

- Select PS Query for the Selection Tool
- Query Name = **CTC_FA_SB_ROLLOVER_CHK**
- Edit Prompts:
 - o Target Aid Year is the Aid Year where the checklist will be assigned to
 - o Institution
 - o Chklst Item to be copied
 - o Previous AY Chklst Status = Completed
 - o Target AY Chklst Status = Completed
- Select **Preview Selection** and choose a student or students to review.

Example Run Control ID for Completing ELW083



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

NEW

3C Engine Parameters

Manage Duplicate Assignment

Run Control ID WA260_OY_ROLLOVER_ELW083_DE

[Report Manager](#)

[Process Monitor](#)

[Run](#)

Process 3Cs

☒ Population Selection

☐ Trigger Table

☐ Mass Change

Process Joint Records

☒ No Joint Processing

☐ Yes, all Joint IDs

☐ Yes, if match exists

Event Selection

Academic Institution WA260 Lake Washington Inst. of Tech.

Administrative Function FINA Financial Aid

Event ID FISELW083C CR-Dual Program Declaration

[Detail](#)

Communication Key

Checklist Code

ELW083 Dual Program Declaration

Checklist Item

100 ELW083 Dual Program Declaration

Comment Category

Population Selection

Selection Tool PS Query

Query Name CTC_FA_SB_ROLLOVER_CHK

[Edit Prompts](#)

[Launch Query Manager](#)

[Preview Selection Results](#)

[Save](#)

[Notify](#)

[Add](#)

[Up](#)

3C Engine Parameters | [Manage Duplicate Assignment](#)



Rollover Non ISIR Related Checklists in Completed Status from Prior Year

×

Help

Query Prompts

*Target Aid Yr

2026

Q

*Institution

WA260

Q

Chklist Itm

ELW083

*Previous AY Chklist Status

Completed

▼

*Target AY Chklist Status

Completed

▼

OK

Cancel

The Event ID is tied to updating an existing checklist, so the Manage Duplicate Assignment does not need to be configured.

3C Engine Parameters

Manage Duplicate Assignment

Run Control ID

WA260_OY_ROLLOVER_ELW083_DE

Report Manager

Process Monitor

Run

Duplicate Communication Check

☐ Check Duplicate Communication

Explain

Additional Conditions to Prevent Duplicate Communication

Variable Data

▼

Explain

Communication Status

▼

Explain

Duplicate Checklist Check

☐ Check Duplicate Checklist

Explain

Additional Conditions to Prevent Duplicate Checklist

Variable Data

▼

Explain

Checklist Status

▼

Explain

Save

Notify

Add

3C Engine Parameters

Manage Duplicate Assignment

Once the process runs to Success and Posted review the checklist status of the student/students from the preview selection.