

SIS Job Aids #171

Manually Updating Financial Aid Checklists

There are many checklist items for the different modules. A list of Financial Aid Checklists can be found at: [Checklist Codes](#).

Changing the status or completing a checklist can be done several ways (manually changing the status, API updates, ImageNow updates or file transfer). Usually the updates will automatically occur, but you may occasionally need to make a manual update.

Path

Financial Aid > View Financial Aid Status

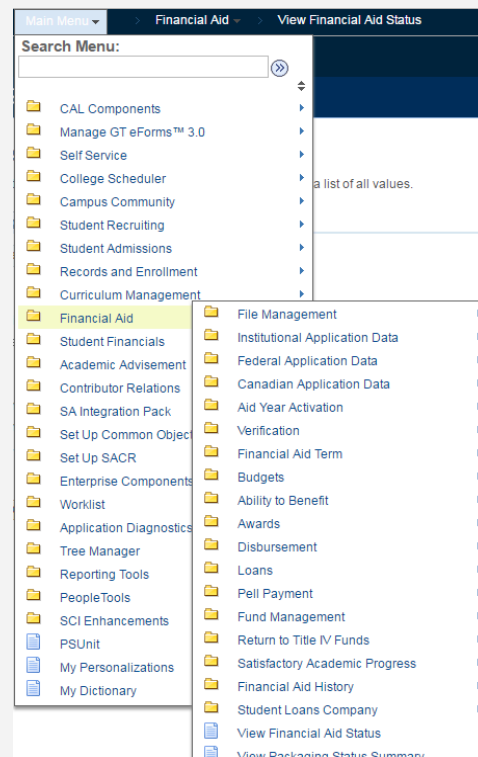
OR

Classic Menu

Campus Community > Checklists > Person Checklists > Checklist Management-Person

1. From the **Main Menu**, navigate to **Financial Aid > View Financial Aid Status**.

Note: You could also do this from: **Main Menu > Campus Community > Checklists > Person Checklists > Checklist Management-Person**.



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- The **View Financial Aid** Status page will display Financial Aid checklists assigned to this student as well as the current status and date.

If there are several, use the **Arrow** keys to navigate or click "**View All**" to see all the checklists.

Financial Aid Status

Student, Sanjay ID: [REDACTED]

Aid Year: Federal Aid Year 2016-2017

Institution: UCB01

National ID: [REDACTED]

Campus ID: [REDACTED]

Birthdate: 09/10/1987

Dependency: Independent w/Primary EFC

EFC Status: Official

App Date: 02/16/2016

CPS Date: 02/17/2016

Inst Date: 02/18/2016

Correction Status:

Correction Status Date:

Packaging Status Summary

Aid Application Status: Active

Package Status: Applied

SAP: Undetermine

Review Status: Incomplete

INST Verification Status: Non Select

Verification Flag: Not Req'd

Verification Status: Not Select

Disbursement Hold:

Entrance Interview:





Exit Interview:

Item Code	Description	Status Date	Status
FVFA	Verification Indep CD (16-17)	02/25/2016	Incomplete
FSTXA	Student 2015 Fed Tax (16-17)	02/24/2016	Initiated
FFAFSA	FAFSA	03/01/2016	Completed
FAPCA	Parent Contribution Appeal	04/08/2016	Initiated

- Click a **Checklist Item Code** to view and edit the details of that checklist.

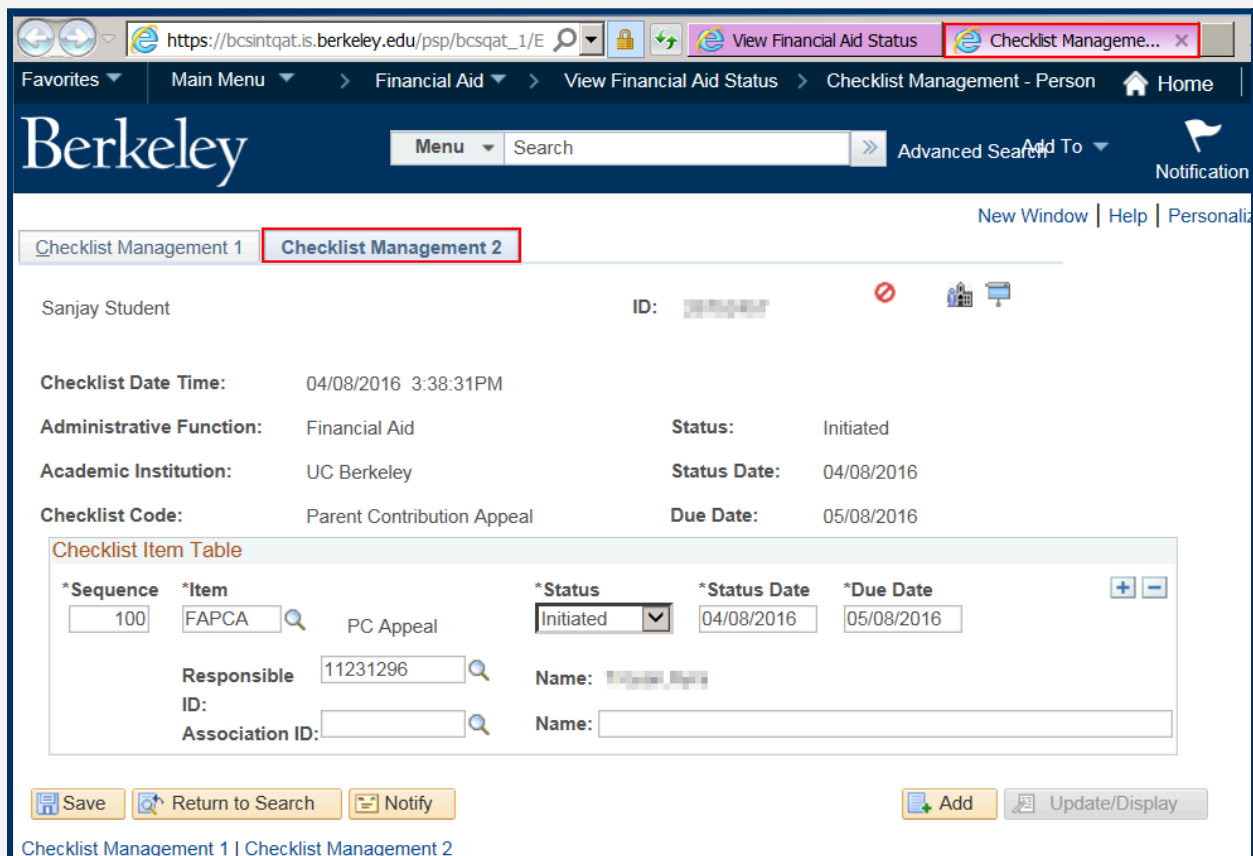
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In this example, the **FAPCA** option is clicked to update the status for the Parent Contribution Appeal checklist.

Checklists			
		Personalize Find View All  	First  1-4 of 4  Last
Item Code	Description	Status Date	Status
FVFCA	Verification Indep CD (16-17)	02/25/2016	Incomplete
FSTXA	Student 2015 Fed Tax (16-17)	02/24/2016	Initiated
FFAFSA	FAFSA	03/01/2016	Completed
FAPCA	Parent Contribution Appeal	04/08/2016	Initiated

- The system will open up **Checklist Management 2** page in a new browser window.

Note: **Checklist Management 1** page is primarily used when creating a new checklist. It's not necessary to go to that page unless you would like to add an internal comment.



Sanjay Student ID: [REDACTED]

Checklist Date Time: 04/08/2016 3:38:31PM

Administrative Function: Financial Aid Status: Initiated

Academic Institution: UC Berkeley Status Date: 04/08/2016

Checklist Code: Parent Contribution Appeal Due Date: 05/08/2016

*Sequence	*Item	*Status	*Status Date	*Due Date
100	FAPCA PC Appeal	Initiated	04/08/2016	05/08/2016

Responsible: 11231296 Name: [REDACTED]

ID: [REDACTED] Name: [REDACTED]

Association ID: [REDACTED] Name: [REDACTED]

Buttons: Save, Return to Search, Notify, Add, Update/Display

Checklist Management 1 | Checklist Management 2

Note: This is one of the few times we should **NOT** click a plus button. Doing so would prompt you to add a duplicate Checklist.

- Click the **Status** drop-down list to see the available statuses.
- Select the appropriate status.

In this example, we selected “Active” because the form has been received and a counselor is reviewing the case. We could also have changed it to “Incomplete” and let the student know we need further information. – The **Status Date** will update automatically.

- Remember to click the **Save** button.

The screenshot shows the 'Checklist Management 2' interface. At the top, there are tabs for 'Checklist Management 1' and 'Checklist Management 2'. Below the tabs, the student's name 'Sanjay Student' and ID are displayed. The 'Checklist Date Time' is 04/08/2016 3:38:31PM. The 'Administrative Function' is 'Financial Aid', 'Academic Institution' is 'UC Berkeley', and 'Checklist Code' is 'Parent Contribution Appeal'. The 'Status' is 'Initiated', 'Status Date' is 04/08/2016, and 'Due Date' is 05/08/2016. Below this, the 'Checklist Item Table' shows a table with columns: *Sequence, *Item, *Status, *Status Date, and *Due Date. The first row has *Sequence 100, *Item FAPCA (with a search icon), *Status Active (highlighted with a red box and a dropdown arrow), *Status Date 04/11/2016, and *Due Date 05/08/2016. Below the table, there are fields for 'Responsible ID' (11231296), 'Name', and 'Association ID'. At the bottom, there are buttons: 'Save' (highlighted with a red box), 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

- If you return to and refresh the **View Financial Aid Status** page, the new status and date will display.

The student will soon see the updated status on their **CalCentral** page.

Checklists		Personalize	Find	View All	First	1-4 of 4	Last
Item Code	Description	Status Date	Status				
FVFCA	Verification Indep CD (16-17)	02/25/2016	Incomplete				
FSTXA	Student 2015 Fed Tax (16-17)	02/24/2016	Initiated				
FFAFSA	FAFSA	03/01/2016	Completed				
FAPCA	Parent Contribution Appeal	04/11/2016	Active				