Add a New Checklist Step

For more information about Checklists go to Help>Tutorial Videos>[3.09] Personnel-Create Checklists

1. Click ***Add Step***
2. Add a step name
3. Enter instructions for the recipient in Recipient
4. Enter instructions that only administrators can see in Administrator
5. Add a date that the step is due to be complete:
   Step due dates:
   - Are only linked to the single step instance on the current checklist
   - Do not copy when you copy a checklist
   - Cannot be changed for individual recipients
   - Unlike *checklist* due dates, are only visual prompts for checklist recipients. Step due dates have no other functions besides appearing on the step as a timing prompt to the recipient.
6. Click **Add Step**. A new menu will appear
7. Optional: 'Recipient can mark as complete'. This option allows the recipient to mark steps complete on the checklist. If you want an administrator to review and mark the step complete instead of the recipient, **uncheck** the box. If you need to review the uploaded document do not leave this box checked.
8. Check **'Step for Administrator use only'** if only the administrator will see this step, but the recipient will not.